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AN ECONOMIC STATEMENT AND A VISIT PROFILE OF ATLANTIC REGION NATIONAL PARKS AND NATIONAL HISTORIC SITES

PREPARED FOR:

ENVIRONMENT CANADA
CANADIAN PARKS SERVICE

PREPARED BY:

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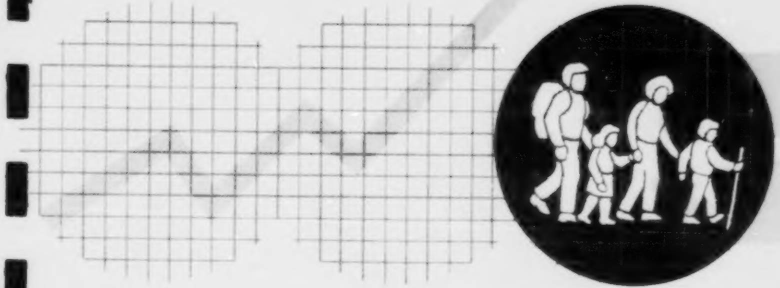

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This report presents the positive economic impacts associated with existing national parks and national historic sites in the Atlantic Region. Particularly, one will find the assessment of direct, indirect and induced provincial level economic effects for each park and site for fiscal year 1989/90.

This report will provide local populations, businesses and other interested groups with a more comprehensive view of some secondary benefits associated with the individual park, as well as for the CPS program in each Atlantic province.

Finally, the success of this project was highly dependent on the outstanding cooperation demonstrated by staff at all field responsibilities, ARO and PHQ level.

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EXECUTIVE SUMMARY

National Parks and Historic Sites are a major component of the tourism industry in Atlantic Canada. Thirty-two national parks and sites operate in the region. This study estimates the significance of these Canadian Park Service (CPS) facilities on the provincial economies. Economic impacts arise from expenditures made by CPS to operate and maintain these facilities, by visitors to the area and park-related investments made by private sector firms for the development, expansion and facilities and services offered to visitors.

Table EX-1 summarizes the economic impact generated as a result of CPS and visitor expenditures.

New Brunswick

Approximately 500,000 visits were made to New Brunswick's two national parks and four national historic sites in 1989. Combined CPS and visitor spending at these facilities amounted to approximately $25.4 million. This spending supported 438 person-years of employment for New Brunswickers and $12.1 million in labour income. In total, the CPS program contributed $18.5 million to provincial GDP. The two national parks in the province, Kouchibouguac and Fundy, accounted for over 90 percent of the economic impact in terms of GDP.

The national historic sites in New Brunswick recorded 92,000 visits in 1989. These visitors spent an estimated $700,000, supporting 10.1 person-years of total employment and $240,000 labour income for people employed in the tourism industry. Spending by CPS to operate and maintain the historic sites amounted to $800,000. This, in turn, supported 22.7 person-years of employment and an additional $700,000 of labour income.

The two national parks reported 380,000 visitors in 1989. Fundy National Park recorded about 60 percent of these visits. Expenditures made by these visitors, in the New Brunswick economy, that can attributed to the parks are estimated at $14.5 million. In turn, these expenditures supported 208 person-years of employment and $4.9 million in total labour income. CPS expenditures to operate the parks in 1989 was reported at $9.4 million, supporting an additional 197 person-years of employment and $6.3 million of labour income.

Table EX-1
Summary of Attendance, Expenditures and Economic Impacts, National Parks and Historic Sites in Atlantic Canada, 1989

	Park Attendance (visits)	CPS Expenditure ($000)	Visitor Expenditure ($000)	Total Expenditure ($000)	Economic Impacts		
					Employment (person-years)	Labour Income ($000)	Contribution to GDP ($000)
New Brunswick							
Kouchibouguac	152,635	5,200	5,200	10,400	176.0	5,000	7,700
Fundy	227,555	4,200	9,300	13,500	229.1	6,200	9,500
N.B. NHS	92,215	800	700	1,500	33.0	900	1,300
Total	472,405	10,200	15,200	25,400	438.1	12,100	18,500
Nova Scotia							
Kejimkujik	51,766	2,200	1,250	3,450	76.5	2,400	3,200
C.B. Highlands	571,041	8,300	17,850	26,150	533.6	13,700	19,500
C.B. NHS	407,882	9,170	8,000	17,170	383.1	11,500	15,700
SW NS NHS	274,845	1,100	2,400	3,500	76.6	2,040	2,840
Hfx. Defence	524,008	3,100	5,800	8,900	190.2	4,920	7,030
Atl. Reg. Office	NA	12,300	NA	12,300	267.2	9,600	12,400
Total	1,823,837	36,170	35,300	71,470	1,527.2	44,160	60,670
Prince Edward Island							
PEI Nat'l Park	692,796*	6,330	25,700	32,030	561.3	13,160	19,670
PEI NHS**	219,982	NA	1,730	1,730	26.8	570	900
Total	912,778	6,330	27,430	33,760	588.1	13,730	20,500
Newfoundland							
Gros Morne	99,284	9,600	3,650	13,250	218.3	7,180	10,300
Terra Nova	166,571	4,300	6,930	11,230	159.8	5,090	7,630
Nfld. NHS	520,269	3,400	5,290	8,690	115.2	3,470	5,330
Total	786,124	17,200	15,870	33,170	493.3	15,740	23,260
Regional Total	**3,995,144**	**69,900**	**93,800**	**163,800**	**3,046.7**	**85,730**	**122,930**

* Based on 1988 attendance levels.

** Only visitor expenditure. CPS expenditure included in Prince Edward Island National Park.

Nova Scotia

Nova Scotia is home to two national parks and twelve national historic sites. In 1989, approximately 2,000,000 visits were recorded at these facilities. Total CPS and visitor spending in this year was $71.5 million. This spending generated 1,527 person-years of employment and $44.0 million in labour income. In total, the CPS program generated about $61 million in provincial GDP.

By national and international standards, Cape Breton's national historic sites are high-quality attractions. In 1989 they recorded over 400,000 visits. These visitors spent an estimated $8.0 million, supporting 136 person-years of total employment and $3.2 million labour income for people employed in the tourism industry. Spending by CPS to operate and maintain the historic sites amounted to $9.2 million. This in turn supported 247 person-years of employment and an additional $8.3 million of labour income.

Four national historic sites are located in southwestern Nova Scotia. Although these sites are less popular than those in Cape Breton, they did attract 275,000 visits in 1989. Visitors to these sites tend to stay for shorter visits relative to the Cape Breton sites, thus visitor expenditures is considerably less at $2.4 million. These expenditures do support 44 person-years of total employment and $1.0 million labour income. Spending by CPS amounted to $1.1 million supporting 33 person-years of employment and $1.0 million of labour income.

Located in the Halifax Metro area, the Halifax Defence Complex is a series of fortifications established to defend the city's harbour. The Halifax Citadel, the major HDC attraction, has proven to be one of the major tourist attractions in Halifax. Attendance in 1989 was about 525,000, higher than that reported at the Cape Breton national sites. Visitor expenditures are $5.8 million. This figure is lower than estimated for Cape Breton historic sites (even though number of visits is greater) due to visits of shorter duration. Employment supported by this spending is estimated at 107 person-years, associated labour income is $2.5 million. CPS expenditures to operate and maintain the Defence Complex is $3.1 million. This, in turn, supported 83 person-years of employment and an additional $2.4 million of labour income.

The Cape Breton Highlands National Park is the most popular CPS facility in the province attracting 570,000 visitors in 1989. Kejimkujik, the province's other national park, recorded just over 50,000 visitors in 1989. Combined visitor spending to these two parks is estimated at $19.1 million with Cape Breton Highlands accounting for 93 percent. In turn, these expenditures supported 322 person-years of employment and $7.6 million in total labour income. CPS expenditures to operate the parks in 1989 was reported at $10.5 million, supporting an additional 288 person-years of employment and $8.5 million of labour income.

Prince Edward Island

The Province of Prince Edward Island, in its own right, is a renowned tourist vacation destination. The Island's only national park (Prince Edward Island National Park) is the most visited tourist facility in the province, attracting about 75 percent of all non-resident tourists. In 1988, about 700,000 visits were recorded at the park. These visitors are estimated to have spent $25.7 million, supporting 416 person-years of total employment and $8.7 million labour income for people employed in the tourism industry. In addition, CPS spent $6.3 million to operate the national park (and historic sites). These expenditures supported 145 person-years of employment and $4.4 million of labour income in the Island economy.

The historic sites are less popular than the national park, but still attract a sizeable number of visitors each year (220,000 visits were recorded in 1989). These visitors are estimated to spend $1.7 million, which, in turn, supports 27 person-years of employment and contributes $571,000 to labour income.

Total CPS and visitor spending at these heritage locations was about $33.8 million. This spending contributed 588 person-years of employment, $13.7 million in labour income and about $20.5 million in provincial GDP.

Newfoundland

The Province of Newfoundland is experiencing a growth in its tourism industry. Visitation to the province's two national parks and five national historic sites has also experienced a growth of 5 percent on an annual basis between 1985 and 1989. In 1989, the total visits to these facilities was about 785,000. CPS and visitor spending was approximately $33 million. This spending generated 493 person-years of employment, $15.7 million in labour income and $23.3 million in provincial GDP.

Gros Morne National Park is located on the west coast of Newfoundland. It serves as an important source of income and employment for many of the local residents. Total economic impacts associated with CPS and visitor spending was 218 person-years of employment, $7.2 million in labour income and $10.3 million in provincial GDP.

Terra Nova National Park is located 240 kilometers north of St. John's. In 1989, CPS and visitor spending at Terra Nova was $11 million, which supported 160 person-years of employment, $5 million in labour income and $7.6 million in provincial GDP.

Newfoundland's five national historic sites are also popular tourist attractions. Signal Hill is the most popular of these five sites. In 1989, over 500,000 visits were recorded at these facilities. CPS and visitor spending at these sites resulted in an estimated 115 person-years of employment, $3.5 million in labour income and $5.3 million in provincial GDP.

Total Atlantic Region Impacts

In total, the Atlantic Region Parks Program supported just over 3,000 person-years of employment with an associated labour income of $86 million in 1989. Spending that can be attributed to park visitors combined with CPS expenditures to operate the facilities are estimated to contribute $123 million to the regions GDP. This represents about .35 percent of the Atlantic Region's total GDP in 1989.

GLOSSARY OF TERMS

Day users:	Those travelling into the national park but not staying overnight in the national park.
Main destination:	The primary or principal vacation destination.
Non-resident:	Person or parties whose permanent residence is outside the province visited.
Off-season:	November to April.
Overnight users:	Persons staying overnight in the national park.
Party night:	A unit of measure defined as one night of campground use by one group of people occupying a campsite.
Peak season:	July and August.
Planned destination:	A secondary destination or one in a series of destinations.
Shoulder season:	May, June, September and October.
Visit:	An entry of a person into a reporting unit for a day or part thereof for heritage appreciation or recreation. Visit includes both day use and overnight use visits.

1.0 INTRODUCTION AND METHODOLOGY USED

1.1 Introduction

National parks and historic sites are a major component of the tourism industry in Atlantic Canada. Thirty-two national parks and historic sites operate in the region (seven in New Brunswick, fourteen in Nova Scotia, four in Prince Edward Island and seven in Newfoundland) (Figure 1-1). This study estimates the significance of these Canadian Parks Service (CPS) facilities on the region's economy. Economic impacts arise from expenditures made by CPS, by visitors to the area and parks related investments made by private sector firms for the development, expansion of facilities and services offered to visitors. These are estimated for 1989.

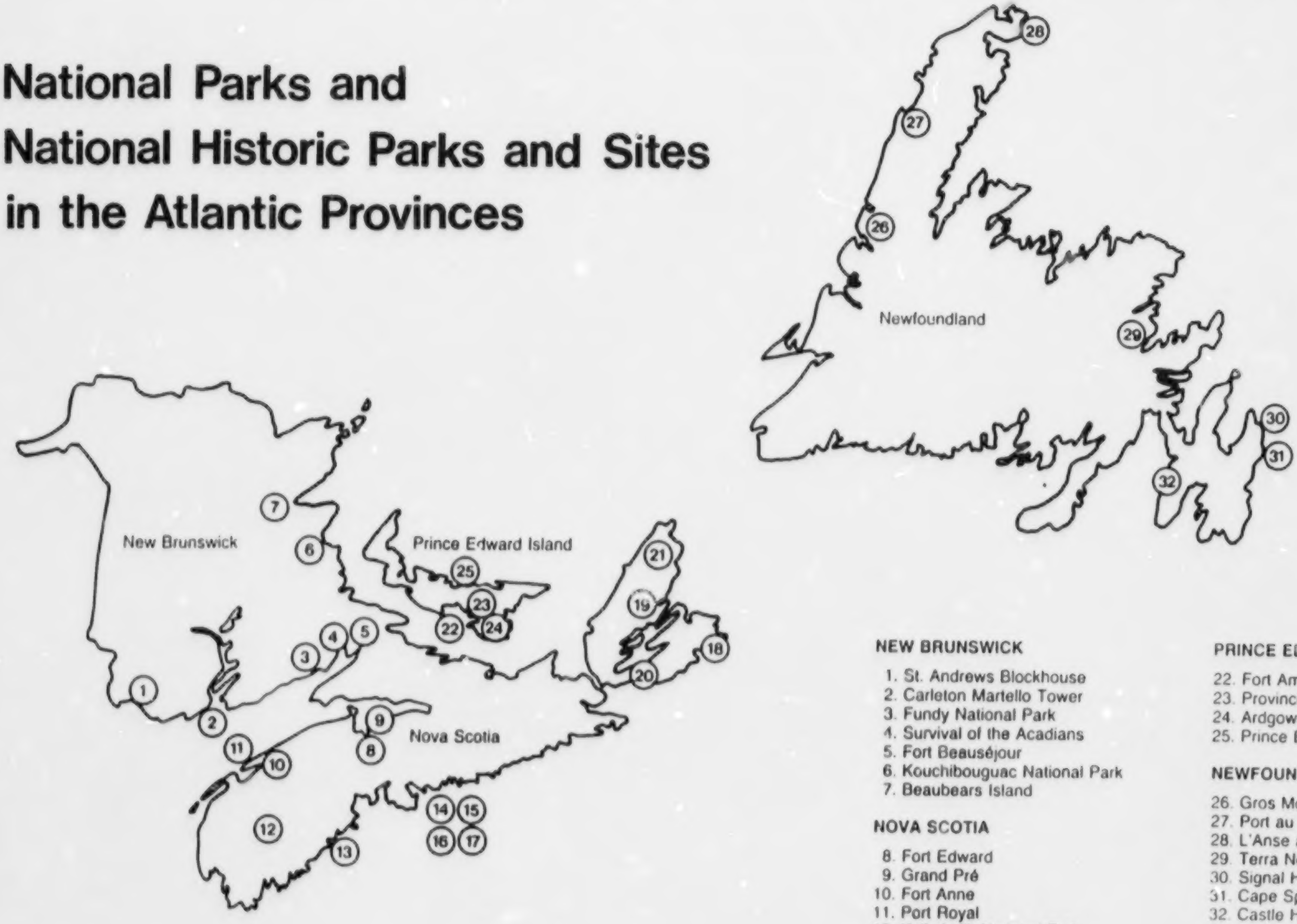
A study indicating the economic impacts associated with the management and operation of national parks and historic sites in Atlantic Canada is useful for putting these parks and sites in an economic regional context. In other words, it shows how important national parks and sites are to the economies of each of the four provinces and the region as a whole. The visit profile and economic impact analyses, in turn, will serve as an important input to CPS management and planning processes.

The first national park, Banff, was established in 1885. Since then the system has grown. Today there are parks in every province and both territories. Cape Breton Highlands, established in 1936, was the first national park in Atlantic Canada. Today seven national parks operate in the four Atlantic Provinces.

Canada's national historic park system began in 1917 at Fort Anne in Annapolis Royal, Nova Scotia. Since then, more than 70 national historic parks have been developed across Canada. Atlantic Canada boasts twenty-five national historic parks.

The report is presented in five remaining sections. Section 2 contains an overview of tourism in Atlantic Canada. Section 3 presents visit profiles of each national park and historic site in New Brunswick as well as an examination of economic impacts that have been associated with these parks in 1989. Similar profiles for the provinces of Nova Scotia, Prince Edward Island and Newfoundland are presented in subsequent sections.

National Parks and National Historic Parks and Sites in the Atlantic Provinces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NEW BRUNSWICK

1. St. Andrews Blockhouse
2. Carleton Martello Tower
3. Fundy National Park
4. Survival of the Acadians
5. Fort Beauséjour
6. Kouchibouguac National Park
7. Beaubears Island

NOVA SCOTIA

8. Fort Edward
9. Grand Pré
10. Fort Anne
11. Port Royal
12. Kejimkujik National Park
13. Bank Fishery: Age of Sail
14. Halifax Waterfront Buildings
15. Halifax Citadel
16. Prince of Wales Martello Tower
17. York Redoubt
18. Fortress of Louisbourg
19. Alexander Graham Bell
20. St. Peters Canal
21. Cape Breton Highlands National Park

PRINCE EDWARD ISLAND

22. Fort Amherst/Port La Joye
23. Province House
24. Ardgowan
25. Prince Edward Island National Park

NEWFOUNDLAND

26. Gros Morne National Park
27. Port au Choix
28. L'Anse aux Meadows
29. Terra Nova National Park
30. Signal Hill
31. Cape Spear
32. Castle Hill

The national parks and historic sites examined include:

New Brunswick

National Parks

- Fundy
- Kouchibouguac

National Historic Sites

- Carleton Martello Tower
- Beaubears Island
- Fort Beauséjour
- St. Andrews Blockhouse
- Survival of the Acadians

Nova Scotia

National Parks

- Cape Breton Highlands
- Kejimkujik

National Historic Sites

- Alexander Graham Bell
- Fort Anne
- Fort Edward
- Fortress of Louisbourg
- Grand Pré
- Halifax Citadel
- Marconi
- Port Royal
- Prince of Wales Martello Tower
- St. Peters Canal
- York Redoubt
- Grassy Island

Prince Edward Island

National Park

- Prince Edward Island

National Historic Sites

- Ardgowan
- Fort Amherst/Port-La-Joye
- Province House

Newfoundland

National Parks

- Gros Morne
- Terra Nova

National Historic Sites

- Cape Spear
- Castle Hill
- L'Anse aux Meadows
- Port au Choix
- Signal Hill

1.2 Methodology and Information Sources

National parks and historic sites in Atlantic Canada generate two main types of economic benefits for residents of the region. Employment and income for residents represent the most obvious of these benefits and directly contributes to the productivity of the regional economies.

However, people derive a sense of well-being from using the parks and protected areas or just from knowing that the parks and protected areas are there for them and their children to use at some time in the future. This represents another significant benefit of parks and historic sites. While the 'non-market' benefits generated by parks and historic sites are substantial, there are no data to indicate just how large these benefits really are. As a consequence, this analysis focuses only on those economic impacts of park development and operation that can be readily quantified.

1.2.1 The Nature of Economic Impacts

The development and operation of parks and historic sites provides several different types of employment and income benefits for residents of Atlantic Canada.

Atlantic Canadians working in the tourism sector (hotels, restaurants, guiding and other services) benefit directly through the expenditures of park visitors. Such spending has caused local businesses in many communities to upgrade facilities and improve services. Employment in the tourism sector has become an increasingly important source of income in these communities.

For some residents, these benefits take the form of income through direct employment by the Canadian Parks Service. In some smaller communities, the Canadian Parks Service has become a major source of permanent and seasonal employment.

Many other residents benefit indirectly when the Canadian Parks Service or tourism business operators purchase goods and services from local retailers or hire local contractors to undertake construction projects.

In turn, any Atlantic Canadians who have directly or indirectly earned income from the parks spend a portion of this income in the region, and these expenditures generate additional induced income and employment. Thus, the total economic impacts of parks and historic sites go far beyond the amount of money spent by the Canadian Parks Service and park visitors.

While the direct effects of both CPS and visitor spending can be readily quantified, the indirect and induced effects of these expenditures are much more difficult to trace. Governments have developed models of the national and provincial economies which define the extent to which various sectors or industries are interrelated. With such a model, it is then possible to trace how the effect of an increase in employment and/or income in one industry spreads throughout the remainder of the economy.

To explain the relationship between the direct expenditures and the total impact of a particular expenditure, economists have developed the concept of economic multipliers.

1.2.2 Economic Multipliers

Economists have used the input-output models of the Canadian and provincial economies to derive different types of economic multipliers. Total multipliers describe the total change in the economy that results from an expenditure; these multipliers combine direct, indirect and induced effects. **Direct impact** refers to the increased income to businesses in the park area resulting from a greater demand for goods and services in the area stemming from park development, planning and research projects. **Indirect impacts** result from the increased production by park area businesses who supply intermediate products to industries directly involved in park-related projects. **Induced impacts** result from those who gained income from the park related projects re-spending their income into the economy to purchase goods and services. Taken together, indirect and induced impacts may be thought of as **spin-off impacts**. Multipliers have also been determined for specific types of commodities (such as motor vehicles, motor vehicle parts and other transportation equipment) as well as for entire industries (transportation equipment industries).

Multipliers are usually used to measure changes in three different types of economic indicators: labour income, Gross Domestic Product (GDP) and employment. **Labour income** includes the amount of wages and salaries paid to individuals: **Gross Domestic Product** includes labour income and the net income of incorporated businesses (it represents the value of production resulting within defined geographical boundaries); a **person-year of employment** is the equivalent of one year of work for one person (for example, three individuals working for a four-month period would equal one person-year, or five person-years could represent one individual holding a full-time position for five years). Multipliers for employment indicate the number of person-years of employment generated per $1,000,000 of expenditures, as determined in 1989.

For Canada and the provinces, an input-output model of the economy has been developed by Statistics Canada to estimate these multiplier effects. The most recent version of this model is based on 1984 data but is still considered to be reasonably valid because the overall structure of the national economy has remained largely unchanged, even though price levels have increased substantially. This study used a version of the Statistics Canada model modified by EcoTec Consultants.

The EcoTec model has several enhancements. Using the model the consultant was able to estimate gross production by industry, employment in person-years by industry and total Gross Domestic Product. Employment impacts are estimated using average annual earnings by industry instead of job output ratios. This yields more accurate results for industries such as retail trade, an important consideration in this study. The model calculates impact tax revenues for both provincial and federal governments.

The size of the economic multipliers are largely dependent on the degree to which provinces or regions are self-sufficient in producing all the goods and services required for economic development. Imports of such goods and services from other regions represent "leakages" which reduce the size of the multiplier effect.

The leakages differ between commodities and between provinces. For example if consumers in Nova Scotia spent $100 on beverages, the information from the input-output tables indicates that the gross provincial product of Nova Scotia would increase by about $62 (or about $38 would leak outside the province).

Similar expenditures in New Brunswick would increase provincial GDP by about $58 ($42 would be leaked), while only about $15 of the $100 would remain in the economy in Prince Edward Island.

For this study, total multipliers have been used to describe the impacts of parks and historic sites on the economies of the Atlantic Provinces. Separate multipliers have been derived for expenditures by park visitors, Canadian Parks Service expenditures on operations and maintenance and CPS expenditures on capital projects, and these multipliers reflect the mix of goods and services in each of these three categories. Details of how these multipliers have been derived are provided in Appendix II of the Technical Appendices volume of this report.

1.2.3 Other Methodological Issues

There are limitations imposed by the expenditure data that need to be pointed out. One is that some of the CPS expenditures in one province, say in Nova Scotia, leak directly to other provinces. That is, some vendors from whom purchases are made are located in a sister province. Short of dealing with these 'leaks' at the commodity level, i.e., determining the portion of expenditure on any commodity that was made in each of the four provinces, there is no appropriate methodology for dealing with this issue. As a consequence, no adjustments were made to CPS expenditure data. To guide the interpretation of the results, CPS has, however, developed rough estimates for how much of its total expenditures in each location was made out of province directly. These leakages are noted in the discussion of the provincial level impacts later in the report.

Secondly, the impacts depend somewhat on the vantage point of the evaluator. From a local perspective, all heritage location visitors from outside of that local region ought to be considered when evaluating impacts. From a provincial perspective, tourism expenditures arising from resident attendance of heritage locations arguably represent a re-allocation of spending, except where the location kept residents from otherwise travelling (thus spending) outside the province. No data are available on just how many residents enjoy heritage locations as an alternative to travelling out of province. Thus, this study generated impacts utilizing expenditure data that includes resident spending.

Thirdly, users of this report should note that economic impacts resulting from visitor expenditures represent the economic activity associated with the tourism related businesses near the park. When an area business makes an investment or expenditure, it is in response to either past visitor expenditures or expected future expenditures. The approach taken in this study counts only the visitor expenditures. To include individual establishment expenditures as well would result in double counting.

Fourthly, a similar logic has been applied to the treatment of revenues collected by CPS. In this study, the economic impact of CPS operations has been documented by examining the impacts associated with their expenditures. Thus, the revenues taken in from visitors are deducted from the value of visitor expenditures since the economic impact associated with the park operation has already been captured through CPS expenditures. Again, this deduction of revenue and fees collected by CPS avoids double counting.

1.2.4 Information Sources

The analysis presented in this document is based entirely on data from existing information sources. Four major types of information were employed.

First, data on expenditures and employment by the Canadian Parks Service were provided by the Halifax and Ottawa offices of the Service. This information is summarized in Appendices I of the Technical Appendices Volume. Detailed estimates of spending in the Atlantic Provinces were based on Canadian Parks Service budget information (Line Object Summaries) which is summarized for individual parks (reserves) and historic sites in Appendix II.

Second, estimates of attendance at individual parks and historic sites were also provided by the Canadian Parks Service. This data differentiates between the number of "visits" (total attendance) and the number of "visitors" (individual people, some of whom may have accounted for more than one visit). For this analysis, this difference between the number of visits and the number of visitors has been maintained, and information on attendance applies to the period 1985-89.

Third, information on visitor characteristics and expenditure patterns was taken from various park visitor surveys and other studies completed during the past five years. A complete list of these sources is provided in the Bibliography, and a summary of the assumptions used to generate visitor expenditure estimates for each park and historic site is provided in Appendix III. All expenditure estimates are shown in 1989 dollars and the price indices for each province have been used to convert historical cost information into 1989 equivalents.

Fourth, background data on the population and employment characteristics of Atlantic communities was taken from Statistics Canada 1986 census information.

2.0 THE TOURISM INDUSTRY IN ATLANTIC CANADA

The tourism industry is a significant contributor to provincial Gross Provincial Products, and an important generator of employment in Atlantic Canada. Table 2-1 summarizes the economic importance of this industry in each of the four provinces. In terms of its percentage contribution to Gross Provincial Product (GPP) (tourism-related expenditures/Provincial Gross Domestic Product), tourism ranks first in Prince Edward Island, fifth in Nova Scotia, sixth in New Brunswick and seventh in Newfoundland. Total tourism expenditures in the region in 1989 was $2.028 billion. This figure includes resident as well as non-resident expenditures. The industry supports about 70,000 person-years of employment in the region. Governments also benefit from taxes on such retail items as gasoline and alcoholic beverages purchased by tourists. In 1989, the federal government collected about $450 million in tourism tax revenues in Atlantic Canada. Provincial and municipal governments collected an additional $250 million.

While the region offers a diverse range of tourist packages, a recent analysis revealed the industry still relies heavily on a fairly traditional family-style market based on outdoor activities and scenery.[1] Several factors affect the nature and magnitude of the economic impacts of tourism in the region.

Weather

The tourism industry is particularly vulnerable to weather conditions. This is especially true of tourism in Atlantic Canada which relies heavily on beach and scenery attractions. In the Maritimes, where there is a high degree of reliance on "impulse" visitation from adjacent provinces, tourism suffers during spells of bad weather, especially if they occur during weekends. Furthermore, the shortness of the season deters capital formation in tourist infrastructure.

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[1] Atlantic Provinces Economic Council, *Atlantic Canada Today*, 1987, page 136.

Table 2-1
Atlantic Canada Tourism Industry Impact, 1989

Impact	Nfld.	N.S.	P.E.I.	N.B.	Total
Tourism % of GPP	4.8%	5.6%	7.5%	4.7%	
Sector Rank	7th	5th	1st	6th	
Total Revenue ($ millions):					
Accommodation	59	145	31	92	327
Transportation	179	415	39	230	863
Food/Beverage	82	188	41	143	454
Recreation/ Entertainment	24	48	11	41	124
Miscellaneous	57	103	18	82	260
Total	401	899	140	588	2,028
Employment:(1)					
Direct	9,200	22,700	3,100	16,100	51,100
Total in Province	12,000	31,100	4,200	21,600	68,900
Labour Income ($ millions):					
Direct	279	636	91	323	1,329
Total in Province	421	1,029	149	510	2,109
Government Revenues ($ millions):					
Provincial/Municipal	47	106	15	72	240
Federal	80	212	26	129	447
Total Revenues	127	318	41	201	687

(1) Direct-Number employed directly in provincial tourism industry.
Total in Province - Number employed in province, directly and indirectly, as a result of the tourism industry.

Source: *Canadian Tourism Facts*, Industry, Science and Technology Canada - Tourism February 1991, pp. 12-15.

Economic Factors

The state of different economies plays a significant role in determining the strength of any region's tourism industry. When economic times are good people tend to take more vacations and stay longer during their trips. When times worsen, fewer vacations in shorter duration are the norm. The price of local goods also affects the demand for vacations in an area. Relative to the United States, the Atlantic region has high priced gasoline and alcohol, in part because of high taxes imposed on the goods. A weak dollar usually offsets these high costs for American tourists. High gasoline prices might help keep resident tourists in the region but discourage those from central/western Canada.

Tourism Infrastructure

The relative size of tourist expenditures depends on the number (volume) of tourists coming to the region, as well as how much the tourists spend once they are in the region. The number of tourists coming to the region depends in part on the visitor attractions in the region, how accessible these attractions are and on the marketing ability of the industry. The amount that tourists spend once they get to the region is influenced by the tourism infrastructure, such as the accommodation facilities, souvenir and other product outlets and so forth, available to the tourist. Tourism infrastructure is highly developed in Prince Edward Island, well developed in Nova Scotia and New Brunswick, and least developed in Newfoundland.

Transportation Infrastructure

Transportation infrastructure also plays an important role in influencing tourism economic impacts. The road system is considered the weakest link[2] in the Atlantic Provinces' tourism industry. The highways are primarily two lane with limited four lane or divided highways. All provinces are served by ferries. This is a major constraint for the island provinces.

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[2] Tourism Canada, *Federal Tourism Strategy for Atlantic Canada*, September, 1989.

Nature of Tourist Visits

The nature of the tourism industry in terms of the purpose of visits affects the magnitude of economic impacts. Provinces that are the final destination of the tourist experience greater impacts than those where non-residents are merely passing through on route to another destination. Traditionally, New Brunswick has suffered from "being on the way there", rather than being perceived as a destination in its own right. In addition, provinces where a significant number of tourists are visiting friends and relatives will experience lower economic impacts on a per visit basis.

Structure of the Economy

The basic structure of the Atlantic economy differs from the national in that the manufacturing sector plays a less significant role.[3] Since much of the purchases of tourists are for goods manufactured outside the region, only a portion of every tourist dollar spent remains in the region as a benefit. This tends to reduce the economic impacts associated with tourist expenditures in some instances. This is also true for expenditures made by the Canadian Park Service and provincial tourism departments.

Conclusion

Tourism is very important to the economic well-being of Atlantic Canada. In 1989, the industry was responsible for over $2 billion in revenues, and supported about 70,000 person-years of employment. The economic impacts the industry has on the region is highly dependent on a number of influencing factors. Weather conditions make the industry especially vulnerable. In addition, economic conditions, the level of tourism and transportation infrastructure in the region, the nature of tourist visits to the provinces, and the overall structure of the economy are all factors which influence the number of tourists visiting the region, how much money they spend and the size of visitor expenditure impacts.

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[3] APEC, *Atlantic Canada Today*, 1987, page 23.

Having just examined the state of tourism in Atlantic Canada and the factors which influence it, we now turn our attention to a more specific analysis of the economic impacts associated with national parks and historic sites in the Atlantic Provinces.

3.0 NEW BRUNSWICK TOURISM: OVERVIEW[4]

One of the major sectors of the New Brunswick economy is tourism. The industry is a significant contributor to provincial GDP – 4.7 percent of GDP in 1989, sixth in importance – and an important generator of employment – 16,100 direct jobs. The *1989 New Brunswick Visitor Exit Survey* provides a profile of non-resident tourists travelling in the province.

- 2.9 million people (1.2 million tourist parties) visited New Brunswick in the 1989 tourist season. Approximately 36 percent of those parties (about 1 million people) passed through the province on route to other destinations. Another 20 percent (approximately 600,000) visited friends and relatives. Only 13 percent (about 375,000 people) were sightseers. Less than 5 percent visited cultural/historic sites.
- About 35 percent of non-resident tourists are from Central Canada. Another 30 percent come from the other Atlantic Provinces and 30 percent from the United States.
- The percent of non-resident tourists who visit specific attractions are: Magnetic Hill 10.3 percent; Fundy National Park 8.7 percent; Reversing Falls 7.5 percent; Hopewell Rocks 7.1 percent; and, Kouchibouguac National Park, 2.9 percent.

The tourism industry in New Brunswick relies on a traditional family-style market, based on outdoor activities and scenery. Visitors are offered a range of products – from beach/recreation to sporting/adventure to heritage/cultural.

New Brunswick's geographic position serves as a natural roadway connecting North America to Atlantic Canada. The only road access to Prince Edward Island and Nova Scotia is through New Brunswick. This feature provides the province with a considerable potential tourist traffic. The province's tourism strategy throughout the 1980's was based on attempting to get the 4 in 10 tourists who are passing through to pursue tourist activities in New Brunswick. It appears the strategy met with success as the percentage of visitors strictly passing through has decreased from about 50 percent in 1983 to 36 percent in 1989.

New Brunswick's two national parks - Fundy and Kouchibouguac - and five national historic sites are important parts of the province's tourist package. The two parks offer outstanding recreational opportunities. For many tourists, this is directly linked with their motivation to travel, travel preferences and their travel plans. The province's national historic sites offer tourists an opportunity to gain an appreciation of the province's historical heritage.

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[4] Information on tourists visiting New Brunswick presented here was obtained from the *1989 Visitor Exit Survey: June - October*, New Brunswick Department of Tourism, Recreation and Heritage.

3.1 Fundy National Park

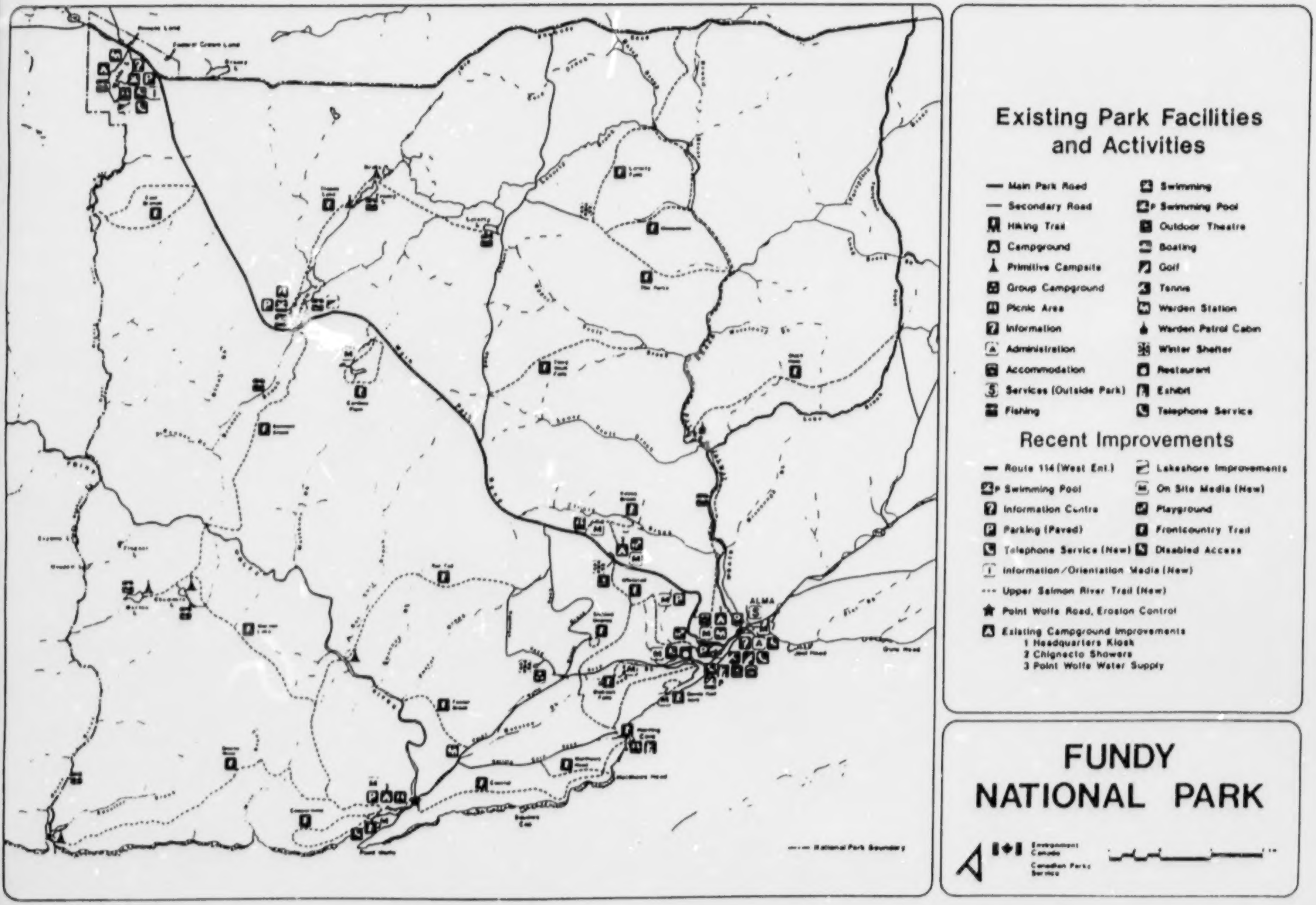
Cradled in forested hills along the shore of the bay that gave it its name, Fundy National Park is a sanctuary of steep coastal cliffs and tide-washed beaches, deep valleys, quick clear streams, and quiet fields. The Bay of Fundy is noted for the world's highest tides. Established in 1948, the park covers an area of about two hundred and six square kilometers in southern New Brunswick. One distinct feature of the park is its location – only a few hours from the Maine/New Brunswick border, just over an hour from Moncton and within two hours of Fredericton and Saint John.

Visitor Use

Fundy National Park offers visitors a variety of activities centered on the four major park themes: the land, the sea, the interaction of the land and sea and the colonization of the land by man. The 613 campsites provided at the park are a major support service for all recreational activities. Fundy ranks second (behind Prince Edward Island National Park) of all the national parks in Atlantic Canada in terms of the number of camping party nights recorded. About 4 out of every 10 visitors to Fundy camp at least one night in the park. The typical camping party stays about two nights in the park.

While camping declined at Fundy from the early 1970s to the mid-1980s, the number of people camping at the park has increased in recent years. The initial decline is consistent with national and regional camping trends over this period. In the late 1980s, camping at the park increased in popularity. In 1987, the establishment of a marketing program, designed to increase the park's share of the camping market, and excellent weather conditions contributed to a 25 percent annual increase in party nights. Since then the demand for camping has remained fairly stable.

The change in demand for camping over this period was accompanied by a shift in the camping market toward an increased use of recreational vehicles, which in turn



FUNDY NATIONAL PARK

Existing Park Facilities and Activities
Main Park Road
Secondary Road
Hiking Trail
Campground
Primitive Campsite
Group Campground
Picnic Area
Information
Administration
Accommodation
Services (Outside Park)
Fishing
Swimming
Swimming Pool
Outdoor Theatre
Boating
Golf
Tennis
Warden Station
Warden Patrol Cabin
Winter Shelter
Restaurant
Exhibit
Telephone Service
Recent Improvements
Route 114 (West Ent.)
Swimming Pool
Information Centre
Parking (Paved)
Telephone Service (New)
Information/Orientation Media (New)
Upper Salmon River Trail (New)
Point Wolfe Road, Erosion Control
Existing Campground Improvements
1 Headquarters Kiosk
2 Chignecto Showers
3 Point Wolfe Water Supply
Lakeshore Improvements
On Site Media (New)
Playground
Frontcountry Trail
Disabled Access
ALMA
National Park Boundary
Environment Canada
Canadian Parks Service

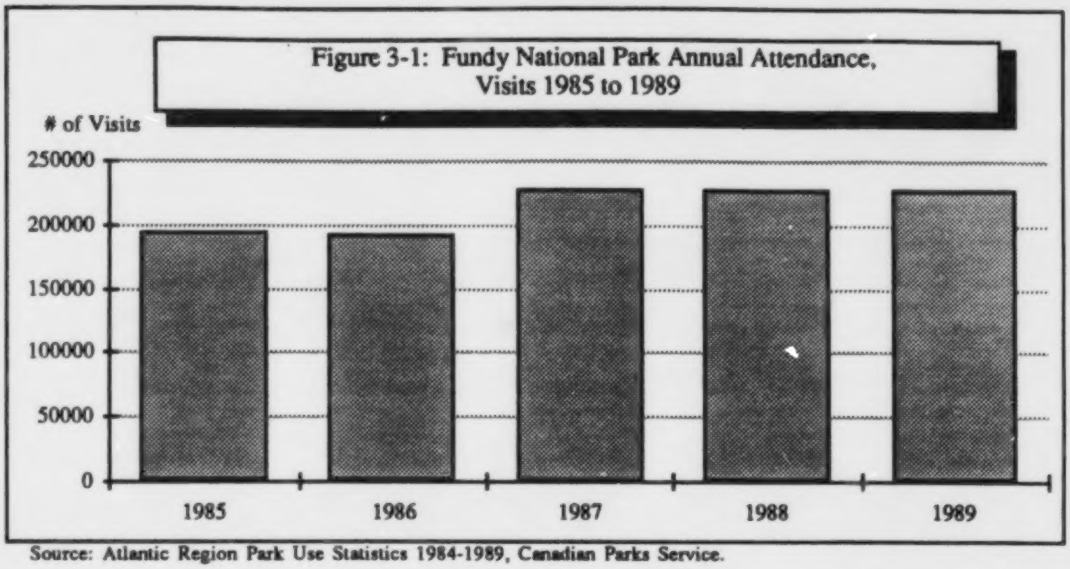
led to a rise in the demand for serviced sites. The demand for these sites has risen to the point where it actually exceeds supply. The serviced campsites have consistently been at or near 100 percent occupancy during the 1980s. In comparison, the unserviced sites experienced an occupancy rate of only about 50 percent over this period.

Along with camping, two of Fundy's more popular outdoor recreational activities are golfing and swimming. The park's nine hole golf course has proven to be an attraction in and of itself. About 10 percent of all visitors to Fundy golf at this course. About 60 percent of these golfers cite Fundy as the main destination. Swimming is also popular, with about 1 in 5 visitors participating in this activity.

Hiking is also a popular activity within Fundy. The 1990 visitor survey showed that 68 percent of the respondents said that their parties hiked at least one trail. Fundy National Park has more than 100 km of hiking trails.

Since 1985, Fundy has drawn at least 190,000 visits per year (Figure 3-1). In recent years attendance has increased to around 230,000 annual visits. The most dramatic increase in annual attendance occurred in 1987 when the number of visits increased by approximately 40,000 over the previous year's mark (in part, the increase in attendance may be attributable to the advertising campaign noted above). Since then attendance has remained fairly stable. For about 90 percent of all visitors Fundy was either a main or planned destination. Many visitors are aware of Fundy's camping, golfing and swimming facilities and plan their vacation with a trip to the park in mind.

Approximately 50 percent of the visitors come during the peak season (July and August) and another 35 percent come during the shoulder season (May, June, September and October). The park ranks third among the seven national parks in the region in terms of off-season use, a reflection of its active winter program.



Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

During the summer months, Fundy attracts visitors from three major markets (Figure 3-2). About half of all visitors are New Brunswickers. Another 30 percent come from elsewhere in Canada and the remaining 22 percent come from foreign countries (mostly the U.S.). During the fall season, the park attracts a larger proportion of foreign visitors (35 percent as opposed to 22 percent).

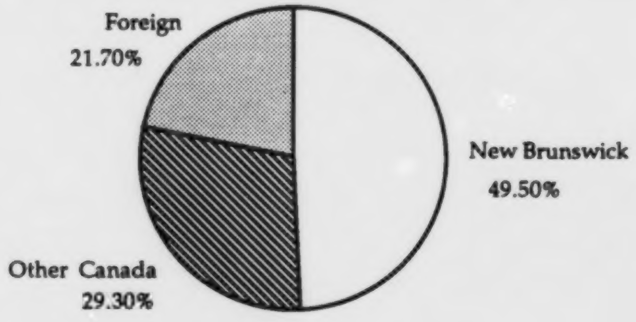
Regional Context

Fundy National Park is a major tourist attraction in the southern New Brunswick area. The park can be accessed most directly via route 114 from the Trans-Canada Highway, a distance of about 25 kilometers. The village of Alma (population 1986: 310), just down the hill from Headquarters campground on Highway 114 east, has accommodation facilities, gas stations, food and supplies.

The Trans Canada Highway carries a high volume of New Brunswick's tourist traffic and the majority of tourist traffic en route to the other Atlantic Provinces. The park is about 80 kilometers south of the city of Moncton. Since many visitors plan their vacation around a visit to the Moncton area, the park also benefits from the other tourist attractions in the area. Along with such other local attractions as Magnetic Hill, Magic Mountain and Crystal Palace, Fundy is an important element of the local tourist vacation package.

According to the 1989 exit survey, about 9 percent of all non-resident tourists to New Brunswick visit Fundy, second only to Magnetic Hill as a tourist attraction in the province. The large number of campsites offered at the park contribute to the accommodation facilities and the tourism infrastructure of the area.

Figure 3-2: Origin of Summer Visitors to Fundy National Park, 1990

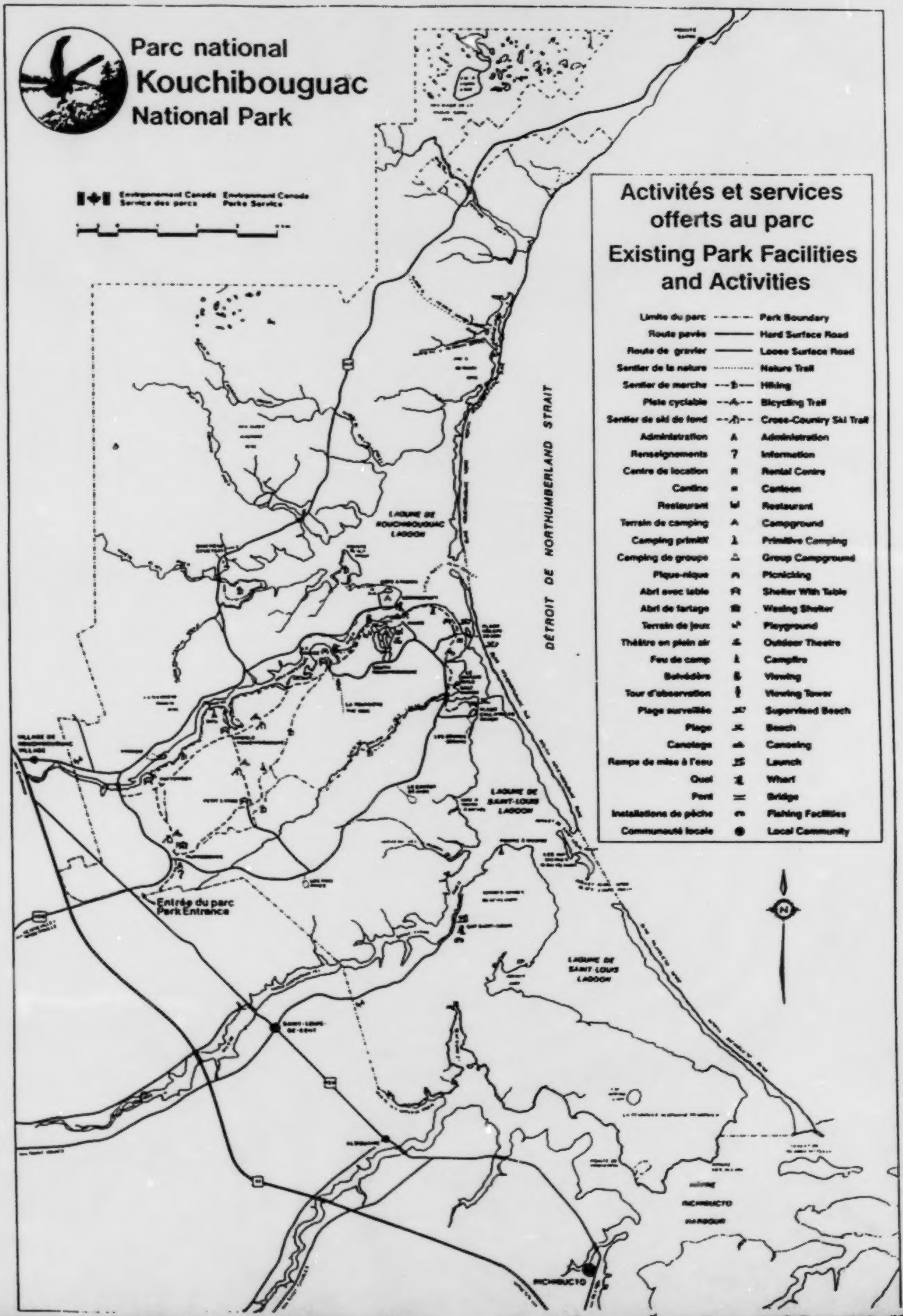


Source: Fundy National Park Visitor Survey, 1990.

The local economy benefits from the $9.3 million in expenditures attributable to visitors to the park. In addition, the overall budget for Fundy Park amounted to $4 million and accounted for 40 percent of the total Canadian Parks Service budget for parks and sites in the province of New Brunswick. About 80 percent of visitor expenditures are made in restaurants and on transportation and accommodation services. Wages and salaries paid to park employees amounted to $2.3 million and $1.9 million was spent by the park on purchases of goods and services in 1989/90. Of the total CPS budget for parks and sites in New Brunswick, spending at Fundy National Park accounted for 41 percent.

3.2 Kouchibouguac National Park

Located 100 km north of Moncton in Kent County, Kouchibouguac National Park covers an area of two hundred and thirty-eight square kilometers. The park is an intricate blend of coastal and inland habitats, including beaches, sand dunes, lagoons, salt marshes, bogs, rivers, forests and fields. The park is home to a wide variety of wildlife. Tern Island is home to one of the largest common tern nesting sites in


Parc national
Kouchibouguac
National Park
Environnement Canada Service des parcs
Environment Canada Parks Service
Activités et services offerts au parc
Existing Park Facilities and Activities
Limite du parc — Park Boundary
Route pavée — Hard Surface Road
Route de gravier — Loose Surface Road
Sentier de la nature — Nature Trail
Sentier de marche — Hiking
Piste cyclable — Bicycling Trail
Sentier de ski de fond — Cross-Country Ski Trail
Administration — Administration
Renseignements — Information
Centre de location — Rental Centre
Cantine — Canteen
Restaurant — Restaurant
Terrain de camping — Campground
Camping primitif — Primitive Camping
Camping de groupe — Group Campground
Pique-nique — Picnicking
Abri avec table — Shelter With Table
Abri de fartage — Waxing Shelter
Terrain de jeux — Playground
Théâtre en plein air — Outdoor Theatre
Feu de camp — Campfire
Belvédère — Viewing
Tour d'observation — Viewing Tower
Plage surveillée — Supervised Beach
Plage — Beach
Canotage — Canoeing
Rampe de mise à l'eau — Launch
Quai — Wharf
Pont — Bridge
Installations de pêche — Fishing Facilities
Communauté locale — Local Community
DÉTROIT DE NORTHUMBERLAND STRAIT
LAGUNE DE KOUCHIBOUGUAC LAGOON
LAGUNE DE SAINT-LOUIS LAGOON
LAGUNE DE SAINT-LOUIS LAGOON
Entrée du parc
Park Entrance
SAINT-LOUIS-DE-KENT
HAVRE RICHIBUCTO HARBOUR
RICHIBUCTO
N

North America; a herd of grey and harbour seals guard the mouth of the St. Louis River. The lagoons and salt marshes give food and shelter to resident seabirds and tens of thousands of migratory shorebirds, geese and ducks. Inland, the forest hosts many of the land mammals common to Eastern Canada including moose, deer, black bear, beaver, fox, hare, groundhog, porcupine and coyote.

Visitor Use

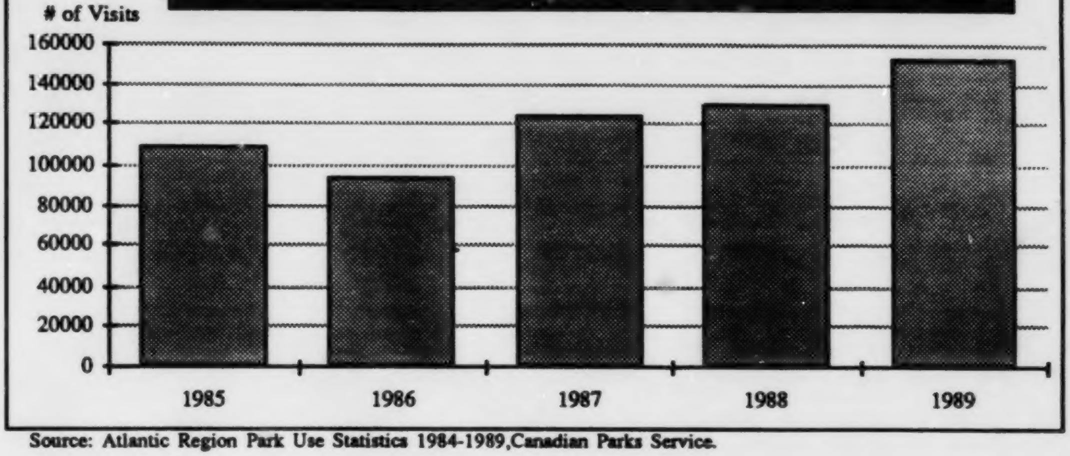
About 40 percent of all visitors cite the beach as the main reason they visit Kouchibouguac. About 90 percent of all park visitors report using park beaches for either swimming or taking beach walks. The beaches at Kouchibouguac National Park, like Prince Edward Island National Park, lead to a large number of day use visits (mostly beach use) compared to other parks in the Atlantic Provinces.

Camping is another popular reason why people visit the park. Twenty percent of all visitors cite camping as the main reason they visit Kouchibouguac, resulting in occupancy rates of about 90 percent during July and August. In total, about one in four visitors camp at Kouchibouguac. The average length of stay for camping parties is about 3 nights, about 1 night more than the average stay reported at Fundy.

Since 1985, Kouchibouguac averaged about 120,000 visits per year (Figure 3-3). Although attendance decreased in 1986, between 1985 and 1989, the number of visits to the park increased at an average rate of about 10 percent per year.

Although the peak and shoulder seasons are the busiest times – about 50 percent of all visits are made in the peak season and another 35 percent during the shoulder season – winter activities like cross-country skiing are popular. The winter market consists mostly of local residents from the Kent county area (79 percent) who come to participate in cross-country skiing (77 percent of all visitors). In 1989, during the off-season over 40,000 visits (15 percent of the total number of visits) were recorded.

Figure 3-3: Kouchibouguac National Park Annual Attendance, Visits, 1985 to1989



Source: Atlantic Region Park Use Statistics 1984-1989,Canadian Parks Service.

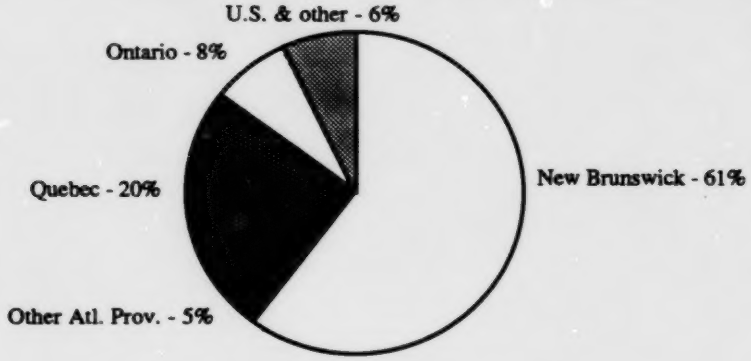
The park is a main or planned destination for a large portion of visitors. For about 6 out of every 10 visitors, Kouchibouguac is the main destination of their trip. About 80 percent of all resident visitors had previously visited the park. The large percentage of repeat visitors indicates a satisfied market of park customers.

Residents of New Brunswick account for the single largest portion (61 percent) of Kouchibouguac's visitors (Figure 3-4). Many come from the local areas of Kent County or Northumberland County. The remaining 39 percent of visitors are non-residents. Next to New Brunswick natives, Quebecers make up the largest portion of park visitors at 20 percent. This is similar to the percentage of visitors from Central Canada and the three other Atlantic Provinces at Fundy National Park. Kouchibouguac attracts a limited number of visitors from the U.S.

Regional Context

Kouchibouguac National Park is located in southeastern New Brunswick and is a natural attraction in Atlantic Canada. In contrast to Fundy which benefits from being near major transportation flows and other tourist attractions, Kouchibouguac is the single most important tourist attraction in the area. This explains why a large percentage of park visitors are residents of New Brunswick and in particular from the park's surrounding region. There are however, several small towns at either end of the park. Richibucto is the largest (population 1986: 1,690). There are motels and a good selection of private campgrounds very close to the park and all its activities. Local communities serve as important providers of overnight roofed accommodation during periods of high occupancy rates. In addition, the surrounding communities of Kouchibouguac, Pointe-Sapin, Saint-Louis-de-Kent, Richibucto and Rexton have grocery, hardware, and department stores, service stations, credit unions and banks.

Figure 3-4: Origin of Visitors to Kouchibouguac National Park, July - Sept., 1988



Source: Market Analysis Kouchibouguac National Park, Zins Beauchesne et Associés, 1989.

In 1989, overnight and day use visitors from outside New Brunswick spent an average of $114 per party per day as part of their trip to Kouchibouguac. New Brunswick day use visitors spent an average of $41.60 per day. In total, visitors to the park spent about $5.2 million in the province of New Brunswick. Spending by day users is about $3.1 million compared with overnight park visitors who spent $2.2 million. Additional CPS expenditures at Kouchibouguac to operate and maintain existing visitor facilities amounted to $5.2 million in 1989 (which accounts for 50 percent of the total CPS budget for parks and sites in New Brunswick). These expenditures are particularly important to the rural economy of this part of New Brunswick.

CPS is also a major employer in the area. In 1989/90 expenditures made by the Canadian Park Service at Kouchibouguac provided 58 person-years of employment. About half of those employed by CPS are full-time employees.

3.3 New Brunswick National Historic Sites

Annual attendance at New Brunswick's national historic sites increased over the study period. In 1985, total attendance at four of New Brunswick's five national historic sites (visitor data are unavailable for Beaubears Island National Historic Site) was about 78,000. By 1989, attendance had grown to over 90,000.

Fort Beauséjour

Fort Beauséjour is located 60 km southeast of Moncton. In 1751, the French built the fort to protect their frontier from British Nova Scotia. The British captured the fort in 1755 and renamed it Fort Cumberland. The fort was revitalized in the early 1800s for the defence of New Brunswick and the Bay of Fundy region. It was manned by a small British garrison until 1835. The fort was then abandoned and gradually fell into ruin. In 1926, the fort was declared a national historic park.

In recent years, extensive efforts have unearthed the remains of much of the fort's original features. Much of what was uncovered was stabilized or reconstructed to its original appearance. During the archaeological study, several hundred thousand artifacts were discovered that tell about the fort's military nature and the day-to-day routine at Fort Beauséjour. Visitors to the fort can explore its ruins, view outdoor paintings of garrison life in the 1700s, and see the panoramic view of the Tantramar marshes.

Visitor Use

Between 1985 and 1989 the number of visits to Fort Beauséjour increased by about 7 percent per year. The single largest annual increase (37 percent) occurred in 1987. Since that year, the number of people visiting the fort has stabilized at around 47,000 annual visits. Visitors to the fort stay an average of about one hour. Expenditures made by visitors at Fort Beauséjour in the province of New Brunswick in 1989/90 have been estimated at $350,000.

Carleton Martello Tower National Historic Park

The Carleton Martello Tower was established as a national historic site in 1930 to commemorate the role of the tower in the defence of Saint John during the War of 1812. It also housed the Saint John Fire Command post which coordinated harbour defences during World War II. The Tower is a rubble stone masonry structure, approximately 15 meters in diameter at the base and 9 meters high. A two-storey steel and concrete superstructure was added in 1941. Visitor interpretation presentations offered focus on the role of martello towers in Canada and the role of Carleton Martello Tower in the defence of Saint John. Period and modern displays are available for viewing.

Visitor Use

Between 1985 and 1989 attendance at Carleton Martello Tower grew by about 3 percent per year. The number of annual visits over this period averaged approximately 27,000. Expenditures made by visitors at Carleton Martello Tower in the province of New Brunswick in 1989/90 have been estimated at $200,000.

Beaubears Island National Historic Park

Beaubears Island National Historic Park is located on the Miramichi River near Newcastle. Located on a densely wooded island of approximately 120 hectares, the Island was the site of an Acadian refugee settlement established by Charles Deschamps de Boishébert in 1756. A key feature of the island is the multi-species forest that include 65 m giant white pines. The site also contains below-ground ruins of domestic and industrial structures associated with the 19th century shipbuilding that took place on the island. Minimal visitor facilities are offered in accordance with conditions of bequest (island bequeathed by Senator O'Brien). Visitors can use the walking trail and picnic area. The park is only accessible by private boat. The village of Nelson-Miramichi provides ferry service on summer weekends.[5]

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[5] Visitor data not available. Consequently, no estimate of visitor expenditures was made for 1989.

St. Andrews Blockhouse National Historic Site

During the War of 1812, the people of St. Andrews fortified their town in case of attack. Located in southwestern New Brunswick in the town of St. Andrews, the blockhouse provides a panoramic view of the St. Croix River. This two-storey, wooden blockhouse is the only surviving example of 12 such fortifications built to protect the western frontier of the province from American invasion. The Site consists of blockhouse (restored) and shore battery of 3 18-pounders on reconstructed carriages and traversing platforms. The interpretation program offered to the public focuses on the role of the Blockhouse and Battery in coastal defence of New Brunswick during the War of 1812 and on the architecture and technology of blockhouses.

Visitor Use

Between 1985 and 1989 an average of 16,000 visits were made to St. Andrews Blockhouse each year. Attendance over the period grew by about 6 percent per year. Visitors to the site tend to stay about 20 minutes on average. Expenditures made by visitors at St. Andrews Blockhouse in the province of New Brunswick in 1989/90 have been estimated at $120,000.

Survival of the Acadians National Historic Site

This site is located in the Memramcook Valley at the Memramcook Institute, just south of Moncton. The exhibit provides information on more than 200 years of Acadian history. Visitors can explore the history and culture of the Acadian people who first settled around the Bay of Fundy in the 17th century. On display are original works by Acadian artists and craftpersons.

Visitor Use

The number of people visiting this historic site dropped significantly between 1985 and 1989. Over this period, attendance decreased by over 17 percent each year. On average visitors to the site stay about 30 minutes. Expenditures made by visitors at Survival of the Acadians National Historic Site in the province of New Brunswick in 1989/90 have been estimated at $30,000.

New Brunswick National Historic Sites Regional Context

In 1989/90, New Brunswick's national historic sites generated 15.5 person years of employment. About half of these were employed on a full-time basis. The remaining employees were either seasonal or casual workers. Operations accounted for about 95 percent of the total employment.

The overall budget for New Brunswick national historic sites for 1989/90 amounted to $840,000 of which $500,000 was paid to employees in the form of wages and salaries. It accounted for 8 percent of the total Canadian Parks Service budget for parks and sites in the province of New Brunswick.

Visitors to New Brunswick's national historic sites has spent an established $700,000 in 1989 in the province of New Brunswick. Most of these expenditures (approximately $500,000) are made by non-residents of the province.

3.4 Importance of New Brunswick's National Parks and National Historic Sites as Visitor Attractions

New Brunswick's national parks and historic sites are major visitor attractions in the province. Currently about a half a million visits are made to these attractions each year (Table 3-1). Since 1985, total attendance at all national parks and sites has increased by about 5 percent per year.

Table 3-1
Total Visits to National Parks and Historic Sites in New Brunswick
1985 to 1989

Year	National Parks	Historic Sites(1)	Total
1985	304,602	77,854	382,456
1986	285,766	76,408	362,174
1987	353,787	95,003	448,790
1988	356,958	95,077	452,035
1989	380,190	92,215	472,405

(1) Since the number of visits made to Beaubears Island Historic Site was not available, the totals include attendance to four of the five sites.

Source: Environment Canada, *Atlantic Region Park Use Statistics 1984-1989*.

A further breakdown of the number of visits made to New Brunswick's historic sites in 1989 is provided in Table 3-2. As shown, Fort Beauséjour is the most visited site in the province, capturing more than half of all visits made to historic sites in this year.

Table 3-2
Number of Visits made to New Brunswick's National Historic Sites in 1989

National Historic Site	Number of Visits
Fort Beauséjour	46,475
Carleton Martello Tower	27,477
St. Andrews Blockhouse	17,065
Survival of the Acadians	1,198
Total	92,215

Source: *Atlantic Region Park Use Statistics, 1984-1989*, Canadian Parks Service.

Attendance levels and the amount of visitor expenditures provide evidence CPS parks and sites are an important element of the present tourism industry in New Brunswick. In order to increase the economic benefits associated with tourism, the New Brunswick provincial government has developed a tourism strategy for the 1990s. The strategy is based on promoting an improved image of New Brunswick as a general tourist destination and as a touring product. It focuses on attracting an increased number of visitors from Central Canada and the United States. The strategy also aims to increase visitors' length of stay in the province. CPS parks and sites and the recreational and cultural opportunities they offer are important elements of the overall touring product the province is promoting.

3.5 Impacts of Visitor Spending in New Brunswick

In 1989, New Brunswick National Parks and Historic Sites attracted 472,405 visits. In total, these visitors spent an estimated $15.0 million on goods and services in the New Brunswick economy. Fundy and Kouchibouguac National Park generated 61 percent and 34 percent, respectively, of the visitor expenditures.

The distribution of visitor expenditures by main industry is set out in Table 3-3. Expenditures made by visitors in New Brunswick consisted primarily of food and beverages (38 percent) and related transportation commodities. In comparison with the other provinces, accommodation services attracted the lowest percentage of total expenditure.

Table 3-3
Expenditures (1) made by Visitors to National Parks and Historic Sites in New Brunswick in 1989 by Industry (2)

Industry	Expenditure
Transportation	$3,865,000
Food and Beverage	$5,780,000
Accommodation	$2,184,000
Entertainment	$1,429,000
Retail	$1,960,000
Total	$15,218,000

(1) Includes resident spending.

(2) Revenues collected by CPS from park visitors for such things as entrance fees or campground fees were deducted from overall visitor expenditures. Appendix II indicates the level of revenues collected at each park.

The economic impacts attributable to these expenditures are shown in Table 3-4. Total impacts from visitor expenditures are estimated to account for $8.6 million of New Brunswick's Gross Domestic Product, as well as $5.1 million worth of labour income and 218 person-years of employment. This represents .08 percent of total New Brunswick GDP for 1989.

3.6 Impacts of CPS Spending on the New Brunswick Economy

The Canadian Parks Service spent $10.2 million developing and operating national parks and historic sites in New Brunswick in 1989-90. A significant portion of those expenditures (47 percent), consisted of wages and salaries, and supported 142.3

Table 3-4
Impacts of Visitor Expenditures on the New Brunswick Economy, 1989

	Direct	Spin-off	Total
National Parks			
Kouchibouguac			
Employment (P-Ys)	51.48	28.66	80.14
Labour Income	$1,110,000	$776,000	$1,886,000
NB GDP	$1,837,000	$1,306,000	$3,143,000
Fundy			
Employment (P-Ys)	82.27	45.79	128.064
Labour Income	$1,750,000	$1,220,000	$2,969,000
NB GDP	$3,000,000	$2,104,000	$5,104,000
NB National Parks			
Employment (P-Ys)	133.75	74.45	208.20
Labour Income	$2,860,000	$1,996,000	$4,855,000
NB GDP	$4,837,000	$3,410,000	$8,247,000
Historic Sites			
Fort Beauséjour			
Employment (P-Ys)	3.28	1.83	5.11
Labour Income	$70,000	$50,000	$120,000
NB GDP	$120,000	$80,000	$200,000
Carleton Martello Tower			
Employment (P-Ys)	1.94	1.07	3.01
Labour Income	$40,000	$30,000	$70,000
NB GDP	$70,000	$50,000	$120,000
St. Andrews Blockhouse			
Employment (P-Ys)	1.20	.67	1.87
Labour Income	$20,000	$20,000	$40,000
NB GDP	$40,000	$30,000	$70,000
Survival of the Acadians			
Employment (P-Ys)	.08	.04	.12
Labour Income	less than $10,000	less than $10,000	less than $10,000
NB GDP	less than $10,000	less than $10,000	$10,000
Total Historic Sites			
Employment (P-Ys)	6.50	3.61	10.11
Labour Income	$130,000	$100,000	$240,000
NB GDP	$240,000	$160,000	$400,000
Total Parks and Sites			
Employment (P-Ys)	**140.25**	**78.06**	**218.31**
Labour Income	**$2,990,000**	**$2,096,000**	**$5,095,000**
NB GDP	**$5,077,000**	**$3,570,000**	**$8,647,000**

person-years in direct (actual) employment. Most of the goods and services (66 percent) were purchased under the capital budget. Information from the individual parks and sites suggests that not all of the goods and services were purchased from suppliers in New Brunswick.[6]

The economic impacts resulting from the Canadian Parks Service are summarized in Table 3-5. The table shows that total CPS spending resulted in $9.9 million in GDP[7], most of which (72 percent), was in labour income. Approximately 220 person-years of employment were associated directly or indirectly with the presence of the Canadian Parks Service Program in New Brunswick in 1989-90 of which 142 was directly provided by CPS in the parks and sites. The two national parks accounted for roughly equal portions of total impacts largely because even though Kouchibouguac National Park had a slightly higher level of expenditures, most were in utilities while most of Fundy National Park's expenditures were on wage and salaries, which have higher direct and indirect impacts on GDP.

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[6] Not all of CPS spending in any of the Atlantic provinces actually ends up in that province. However, no data exits on just what particular commodities, and in what proportions, are purchased from sister provinces or outside the region, thus no appropriate adjustment can be made to the commodity specific expenditure data as they are introduced to the model.

The leaks between the provinces tend to minimize each other. That is, some of the CPS spending in say New Brunswick that leaks to Nova Scotia, is 'replaced' by similar leaks from Nova Scotia. The leakages that leave the region are generally not 'replaced' and where this happens the magnitude of those replacing expenditures is quite small. CPS estimates indicate that between 5 percent (New Brunswick) and 9 percent (Newfoundland) of total CPS expenditures in each province leak directly out of the region. Thus the estimates of economic impacts shown, will tend to be somewhat overstated.

[7] Within the Atlantic region, New Brunswick received a net inflow of CPS expenditures. That is, more of CPS spending made in other Atlantic Provinces ended up in New Brunswick than leaked to New Brunswick from these provinces. This net inflow (an estimated $.7 million) means that the economic impacts shown will tend to be understated.

Table 3-5
Impacts of CPS Spending at Individual Heritage Locations on the New Brunswick Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
Kouchibouguac				
Wages and Salaries	$2,000,000	76.2	$2,500,000	$3,100,000
Good and Services	$3,200,000	19.7	$600,000	$1,500,000
Total	$5,200,000	95.9	$3,100,000	$4,600,000
Fundy				
Wages and Salaries	$2,300,000	89.8	$2,900,000	$3,600,000
Good and Services	$1,900,000	11.1	$400,000	$800,000
Total	$4,200,000	100.9	$3,200,000	$4,400,000
New Brunswick Area NHPS (1)				
Wages and Salaries	$500,000	20.1	$600,000	$800,000
Good and Services	$300,000	2.6	$100,000	$100,000
Total	$800,000	22.7	$700,000	$900,000
Total National Heritage Locations				
Wages and Salaries	**$4,800,000**	**186.1**	**$6,000,000**	**$7,500,000**
Good and Services	**$5,400,000**	**33.4**	**$1,000,000**	**$2,400,000**
Total	**$10,200,000**	**219.5**	**$7,000,000**	**$9,900,000**

(1) Including District Office.

3.7 Total Impacts of the CPS Program on the New Brunswick Economy

The total impacts associated with the operation of CPS facilities in New Brunswick is shown in Table 3-6. Expenditures made by national parks and national historic site visitors and the CPS supported 438 person-years of employment resulting in $12.2 million of labour income. The CPS program accounted for $18.5 million of New Brunswick's GDP.

Table 3-6 also shows a summary of the overall impacts broken down by the individual parks and the historic sites (combined) for both CPS and visitor expenditures. In terms of overall impacts, Fundy National Park accounted for 51 percent of the total GDP impact generated by the CPS program in New Brunswick. Kouchibouguac accounted for 42 percent leaving the historic sites with the remaining 7 percent. Overall expenditure made by CPS accounted for 54 percent of total economic impact (in terms of GDP) as compared with visitor expenditures which accounted for 46 percent.

Table 3-6
Impacts of CPS and Visitor Spending at New Brunswick Heritage Locations on the New Brunswick Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
CPS Spending				
Kouchibouguac	$5,200,000	95.9	$3,100,000	$4,600,000
Fundy	$4,200,000	100.9	$3,200,000	$4,400,000
N.B. Area NHPS (1)	$800,000	22.8	$700,000	$900,000
Sub-total	$10,200,000	219.6	$7,100,000	$9,900,000
Visitor Spending				
Kouchibouguac	$5,200,000	80.1	$1,900,000	$3,100,000
Fundy	$9,300,000	128.2	$3,000,000	$5,100,000
N.B. Area NHPS (1)	$700,000	10.2	$200,000	$400,000
Sub-Total	$15,200,000	218.5	$5,100,000	$8,600,000
Total	**$25,400,000**	**438.1**	**$12,200,000**	**$18,500,000**

(1) Including District Office.

Several ratios can be derived to assess the relative importance of CPS program impacts. The input-output model indicates CPS related GDP as $18.5 million. Dividing this by the total New Brunswick GDP indicates that the CPS program accounted for .16 percent of provincial GDP in 1989. Another useful ratio is the percent contribution of CPS visitor expenditures to total tourism receipts. In 1989, CPS visitors spent $15.2 million. This represents 3 percent of the total tourism receipts spent in the province in that year.

On a provincial scale, CPS economic impacts appear almost insignificant. However it must be noted that the relative economic importance of individual heritage sites is far greater on local economies in the immediate vicinity of the parks or sites. This is especially true since many of the parks and sites are situated in rural areas of the province where limited economic activity takes place.

4.0 NOVA SCOTIA TOURISM: OVERVIEW

Tourism ranks fifth in importance in Nova Scotia in terms of its percentage contribution to Gross Provincial Product – tourism-related expenditures as a percent of GDP was 5.1 percent in 1989. It is also an important generator of employment – 17,100 direct jobs. Highlights of Nova Scotia's tourist industry include:

- Approximately 1.2 million visitors entered Nova Scotia in 1988. About 820,000 or 67 percent came by automobile. Another 240,000 or 20 percent of visitors arrived by air, 112,000 (9 percent) by recreational vehicle and 50,000 (4 percent) by motorcoach.
- Of the almost 1 million visitors who travelled to the province by automobile, motorcoach or recreational vehicle, 74 percent (or 730,000) were Canadian. About 50 percent of visitors come from the three other Atlantic Provinces. Another 20 percent come from Ontario. Tourists from New England account for 10 percent of visitors.
- In 1988, Nova Scotia's travel revenues were $760 million. The non-resident tourist expenditure component amounted to $389 million. Resident travel expenditures were $371 million.
- Most of the tourist dollars in the province are spent in Cape Breton ($165.3 million, 22 percent of the total), Halifax-Dartmouth ($155 million, 20 percent of the total), and the North Shore region ($138.6 million or 18 percent of the total).

Nova Scotia offers visitors many tourism products. Products can be characterized as being heritage/culture, leisure/recreation, beach/recreation, scenic, or urban. In recent years, festivals and events have become a large part of the Nova Scotia product. The Canada Winter Games, the world-famous Nova Scotia Tattoo and the 1987 International Gathering of the Clans are three prime examples.

Cape Breton Island and the Halifax Metro Area are the two best known destination areas in the province. Cape Breton is home to the scenic Cabot Trail, Cape Breton Highlands National Park, the Alexander Graham Bell Museum in Baddeck, the Fortress of Louisbourg, the Bras d'Or Lakes, Miners Museum (Glace Bay), Acadian Cheticamp, and the Scottish Highland Village (Iona). The Halifax Metro area is a well-developed urban centre with museums, historic sites, shops, night-life, dining, marine activities, and the nearby Peggy's Cove fishing village. Other areas of the province attract fewer visitors than either Cape Breton or Halifax Metro but possess products and destinations of note.

The province's tourism strategy recognizes its products are best suited to the touring market segment. Since the emphasis by touring visitors is on 'seeing', national parks and heritage sites are integral components of the product. Nova Scotia is divided into 10 easy to follow trails or routes - each with their own particular theme - which lead through the most scenic parts of the province. All national parks and heritage locations are located along Nova Scotia's travelways:

- Cape Breton Highlands National Park and Alexander Graham Bell National Historic Park along the Cabot Trail.
- St. Peters Canal and Grassy Island National Historic Sites along the Fleur de Lis Trail.
- the Fortress of Louisbourg and Marconi National Historic Site along the Marconi Trail.
- Halifax Citadel National Historic Park, Fort McNab, Prince of Wales Martello Tower and York Redoubt National Historic Sites in the Halifax-Dartmouth area.
- Fort Anne, Fort Edward, Grand Pré and Port Royal National Historic Sites along the Evangeline Trail. Kejimkujik National Park is located on Route 8, which connects the Evangeline Trail and the Lighthouse Trail.

4.1 Kejimkujik National Park

Gently rolling landscape with lakes and rivers make Kejimkujik National Park ideal for those who love the outdoors. The park is located 160 km southwest of Halifax (about a two hour drive) on the Kejimkujik drive which connects the Evangeline Trail and the Lighthouse Trail. It contains 381 square kilometers of forest and lakes and a 329-site campground, as well as unserviced back country sites. Well-maintained hiking trails and canoe routes provide access to the wilderness areas of the park. Exhibits, walking trails, picnic areas and a supervised beach are located in the park.

In 1988, a rugged and beautiful coastal landscape officially became part of Kejimkujik National Park. This 22 square kilometre area is noted for its abundant wildlife and spectacular scenery. Access to this undeveloped area is limited to two trails, so it is ideal for day hikers and birdwatchers.

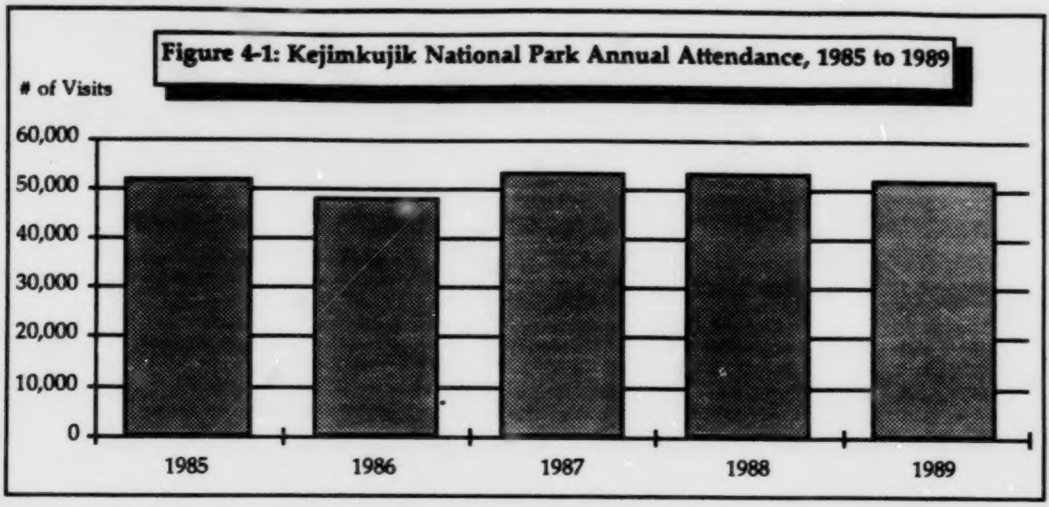
Visitor Use

Kejimkujik National Park is used mostly by outdoor recreationalists with a short vacation (ranging from a weekend to a week) in mind. About 97 percent of all visitors come to participate in recreation activities and stay an average of about 4 nights. About 7 out of every 10 visitors camp at either the main campground or one of the 46 primitive campsites located along trails and beside waterways in the backcountry. Canoeing is one of the most popular recreational activities at the park and about half of all visitors partake in this activity. The most popular area for canoeing is Kejimkujik Lake in the vicinity of Jeremy's Bay campground, although many prefer to canoe the less travelled waterways and then camp at one of the backcountry campsites.

Kejimkujik's attendance has remained fairly stable over the past five years, partially because a large percentage of the park's customers are repeat users. About 70 percent visited the park before and two thirds had visited the previous year. The high portion of repeat 'customers' explains why the park is either the main destination of their trip or a planned destination for 90 percent of all visitors.

Kejimkujik's annual attendance is low compared to other national parks in the region. This helps to preserve the natural character of the park as appreciated by Kejimkujik visitors. About 50,000 visits are recorded at Kejimkujik each year (Figure 4-1). Although the park is open to visitors year round, 50 percent come during the peak season. Another 35 percent visit in the shoulder season.

The number of overnight visits made to Kejimkujik each year is limited by the number of campsites and the limited amount of accommodation facilities in the immediate area. The park's 329 main campsites operates at close to capacity during the peak season. Between 1980 and 1987, camping occupancy rates at the park ranged from 75 percent to 85 percent in the July/August period. According to the visitor survey conducted in 1990, 70 percent of parties said they stayed overnight in the park. Kejimkujik experiences the highest rate of overnight visitors (in terms of the ratio of overnight users to day users) of all parks in the Atlantic region.



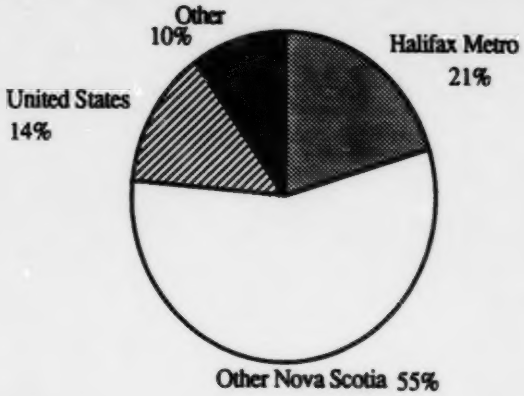
Source: Socio-Economic Analysis Section, ARO, Canadian Parks Service.

Kejimkujik is, by and large, a park used by Nova Scotians (Figure 4-2). Three-quarters of all visitors are residents. The location of the park partially explains the origin of visitors as well as the comparatively small number of visitors. The park is only a two hour drive from Halifax. This location partially explains the origin of visitors. The park is not close to any major transportation route and, therefore, cannot really draw tourists from a passing-by market. Most of the park's non-resident visitors come from the United States.

Regional Context

Kejimkujik National Park is not located in an area with a developed tourist infrastructure. The largest community in the park area is Caledonia, with a population of about 400. The lack of a developed tourist infrastructure in the region means the amount of money visitors inject into the local economy is low compared to more developed park areas. While basic supplies – groceries, snacks and meals – can be purchased in nearby communities, many visitors purchase supplies in their home communities before arriving. Only 3 out of every 10 visitors to Kejimkujik visit Caledonia during their trip to the park. On average, parties visiting Kejimkujik spend about $40 per day during their trip, considerably less than the $140 average daily expenditure of non-resident parties visiting Nova Scotia.

Figure 4-2: Origin of Visitors to Kejimkujik National Park, 1989



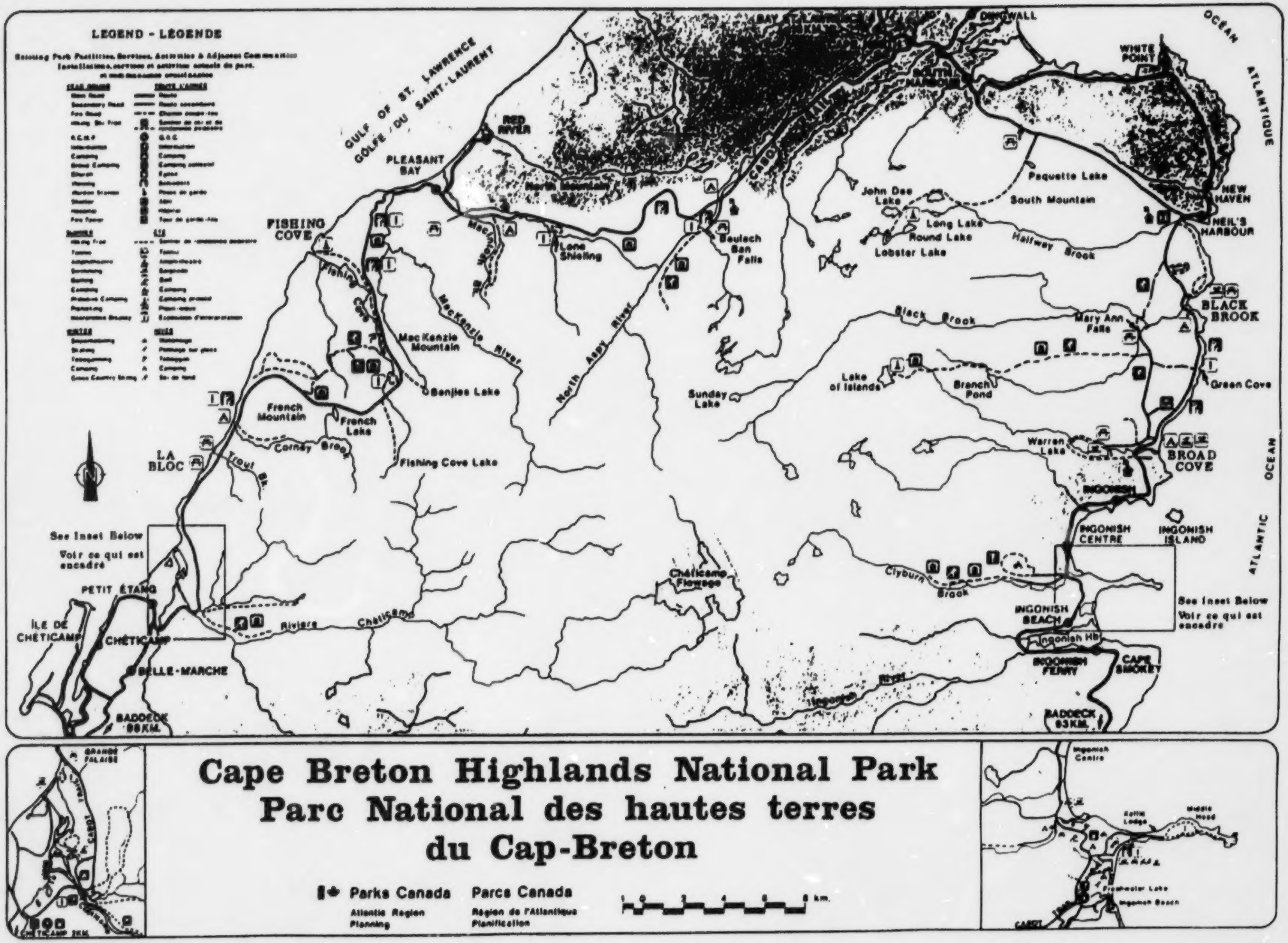
Source: Kejimkujik National Park 1990 Visitor Survey, Canadian Parks Service.

The fact Kejimkujik is the sole destination for many visitors generates few spin-off tourist visits. A recent survey indicated only 1 in 10 of Kejimkujik's visitors visit Upper Clements Theme Park during their trip. Only 3 in 10 visit the Annapolis Royal/Digby area and only 2 in 10 visit the South Shore area.

Total expenditures by visitors to Kejimkujik and CPS in 1989 was approximately $3.7 million. Visitors spent an estimated $1.3 million. Only about $400,000 of the visitor expenditures was spent by non-residents. To operate and maintain visitor and administrative facilities, the Canadian Parks Service spent $2.2 million during fiscal year 1989-90. This represents 6 percent of the total CPS budget for parks and sites in Nova Scotia. In 1989-90, $1.4 million (roughly 60 percent) was spent on wages and salaries for full-time, casual and seasonal employees - 23 full-time (person-years) employees and 14 person-years of employment for the remaining casual and seasonal employees. An additional $800,000 was spent on goods and services.

4.2 Cape Breton Highlands National Park

Within its 950 square kilometers, Cape Breton Highlands National Park protects a variety of wildlife and landscape: a magnificent highland plateau with windswept barrens, deep-walled canyons, picturesque waterfalls, sandy beaches and spectacular



LEGEND - LEGENDE
GULF OF ST. LAWRENCE
GOLFE DU SAINT-LAURENT
OCEAN ATLANTIQUE
ATLANTIC OCEAN
DINGWALL
WHITE POINT
SOUTH HARBOUR
RED RIVER
PLEASANT BAY
FISHING COVE
NEW HAVEN
NEIL'S HARBOUR
BLACK BROOK
BROAD COVE
INGONISH
INGONISH CENTRE
INGONISH ISLAND
INGONISH BEACH
INGONISH FERRY
CAPE SMOKEY
BADDECK 93 KM.
LA BLOC
PETIT ÉTANG
ÎLE DE CHÉTICAMP
CHÉTICAMP
BELLE-MARCHE
BADDECK 98 KM.
See Inset Below
Voir ce qui est encadré
Paquette Lake
South Mountain
John Dee Lake
Long Lake
Round Lake
Lobster Lake
Halfway Brook
Beulach Ban Falls
Lone Shieling
North Aspy River
MacKenzie River
MacKenzie Mountain
Benjies Lake
French Mountain
French Lake
Corney Brook
Trout Br.
Fishing Cove Lake
Black Brook
Mary Ann Falls
Lake of Islands
Branch Pond
Sunday Lake
Green Cove
Warren Lake
Chéticamp Flowage
Clyburn Brook
Rivière Chéticamp
Ingonish River
Ingonish Hb.
Grande Falaise
Chéticamp 3 km
Ingonish Centre
Keltic Lodge
Middle Head
Freshwater Lake
Ingonish Beach
0 2 4 6 8 km.

Cape Breton Highlands National Park
Parc National des hautes terres du Cap-Breton

Parks Canada — Parcs Canada

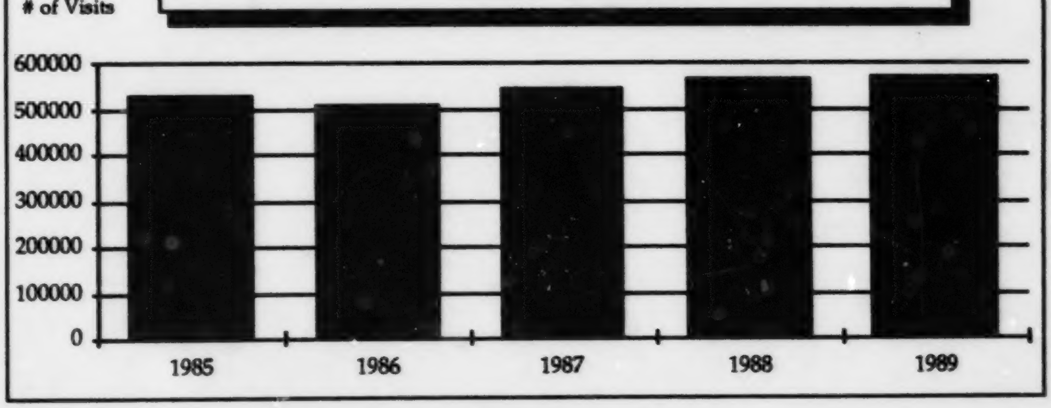
Atlantic Region Planning — Région de l'Atlantique Planification cliffs plunging into the sea. And through it all winds the Cabot Trail, one of the world's most scenic drives. In addition to the scenery, the park offers the unique combination of wilderness and ocean. Included in this are activities such as camping, hiking, skiing, backpacking, and swimming. Another important park activity is golf at the Highlands Links course.

Visitor Use

Cape Breton Highlands National Park is used mainly by tourists interested in touring the Cabot Trail by automobile. Most visitors spend approximately four hours in the park driving the Cabot Trail from Cheticamp to Ingonish. The park's eastern or Atlantic side – Ingonish area – receives the bulk of the park's tourist activity. About half of those arriving at the Ingonish area of the park and about 60 percent of those arriving at the Cheticamp area plan to drive the Cabot Trail.

Between 1985 and 1989, park attendance increased by an average of about 2 percent per year (Figure 4-3). The greatest annual increase in attendance occurred in 1987 when an 8 percent annual increase occurred. This increase was consistent with the higher use of other national parks in the region in that year. The excellent weather experienced in the region has been identified as the main factor.

Figure 4-3: Cape Breton Highlands National Park Annual Attendance Visits, 1985 to 1989



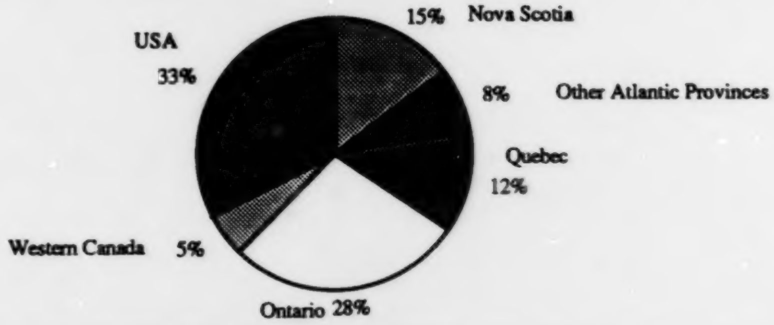
Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

Attendance at the park is highly seasonal, with about 65 percent of all park users visiting during the peak season and another 25 percent during the shoulder season. The colours of the leaves in autumn entice a large number of tourists to tour the Cabot Trail in September and October. About 83,000 visits were recorded during these two months in 1989. Since 1984, annual attendance during these two months grew at an average rate of about 4 percent per year.

Of those visiting the park between May and October, about half stay overnight. The remaining visitors during this period are day users. The typical overnight party consists of about 3 persons and stays about 1.7 nights in the park.

An analysis of the origin of visitors to the park reveals two major markets: the U.S. and Ontario (Figure 4-4) together account for 60 percent of all visitors to the park. In contrast, only 30 percent of all non-residents visiting Nova Scotia are from these two areas. Two factors account for the high portion of non-resident visitors: First, the Cabot Trail is a world famous scenic drive; and, second, the tourist package offered in Cape Breton (Cape Breton Highlands, Fortress of Louisbourg, Alexander Graham Bell Museum, etc.) entices tourists who prefer a touring vacation package offering scenic and cultural opportunities. Most of the remaining visitors to the park come from either Quebec or Nova Scotia.

Figure 4-4: Origin of Visitors to Cape Breton Highlands National Park, July and August 1978*



Source: Compilation and Analysis of Visitor Use in Cape Breton Highlands National Park, Cheryl Watts, December, 1984.

* Results of the 1990 Cape Breton Highlands visitor survey will be available in the near future.

Regional Context

Three main communities surround Cape Breton Highlands National Park. These include Ingonish on the eastern side, Cheticamp on the western side and Pleasant Bay on the northern side. Most tourist activity occurs around the Ingonish area of the park where the golf course, Keltic Lodge and excellent beach (Ingonish) are located. The community of Ingonish offers visitors a variety of services including hotels, motels, campgrounds and stores. Visitors also take advantage of the beaches and accommodation facilities in both Cheticamp and Pleasant Bay.

These three communities provide support services to the park's activities and benefit from purchases made by park visitors. The economy of Cape Breton also benefits from the expenditures made by the Canadian Parks Service to develop, maintain and operate the park. In 1989, visitors and CPS injected about $26.1 million into the economy. Visitor spending accounted for $17.8 million (80 percent of which was made by non-residents) and CPS spent about $8.3 million.

About 60 percent of the $8.3 million in CPS expenditures were spent on purchasing goods and services. Three quarters of these purchases went for capital budget items and the remainder for operating and maintenance expenses. Wages and salaries of park employees accounted for the remaining CPS expenditures ($3.1 million). In 1989, the Canadian Parks Service was responsible for about 95 person-years of employment at the park. About 60 percent of these were full-time employees.

4.3 Nova Scotia National Historic Sites

The Canadian Park Service operates twelve national historic sites in Nova Scotia, located in three regions of the province: Cape Breton Island, Southwestern Nova Scotia and the Halifax Metro area.

4.3.1 Cape Breton Island Region

Four national historic sites are located on Cape Breton Island, including: Alexander Graham Bell Museum, the Fortress of Louisbourg, Marconi and St. Peters Canal.

Alexander Graham Bell

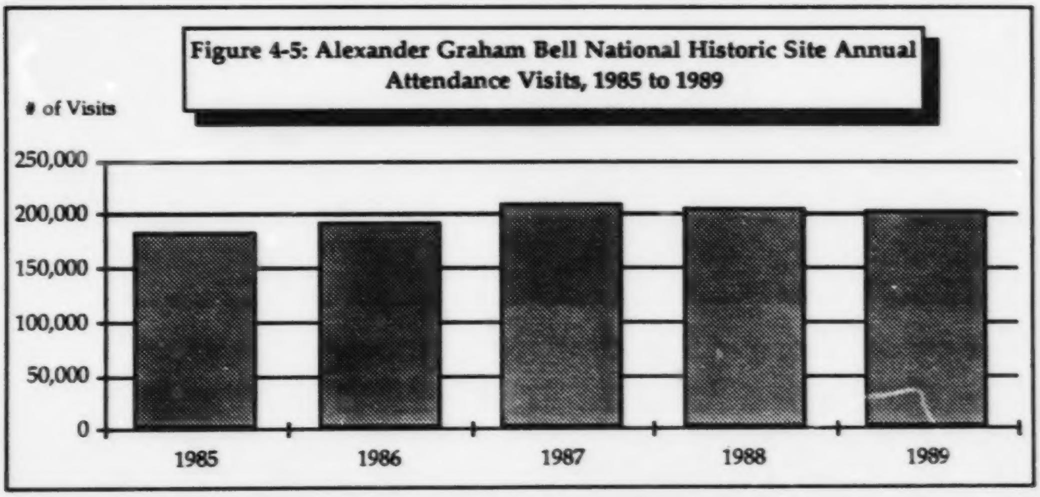
The Alexander Graham Bell National Historic Site is the most comprehensive museum on Bell's scientific and humanitarian achievements. Opened in 1956, the site is located in Baddeck, which marks the beginning and end of the Cabot Trail.

The site is an international quality museum and a destination for nearly all bus tours visiting the Island. The depth of information on Bell place this facility among the best museum attractions anywhere. It is a unique attraction both on Cape Breton Island and in Atlantic Canada.

Visitor Use

Annual attendance at the Alexander Graham Bell Historic Site was quite stable between 1985 and 1989. Attendance over this period grew at an average annual rate of approximately 2 percent. On average about 200,000 visits are made each year. In 1989, total visitor spending at Alexander Graham Bell Historic Site was estimated at $2.9 million. About 80 percent of these expenditures were made by non Nova Scotians.

Figure 4-5: Alexander Graham Bell National Historic Site Annual Attendance Visits, 1985 to 1989



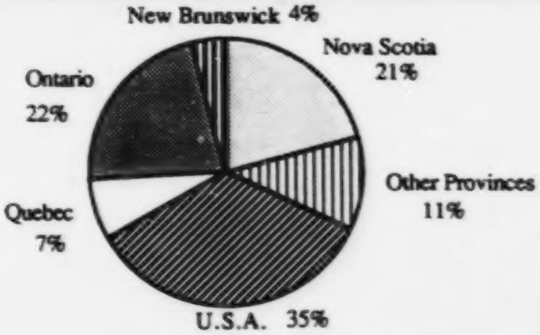
Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

The Alexander Graham Bell National Historic Park 1987 Visitor Surveys, the most recent survey data collected on the historic park, noted the following results:

- Museum visitors intend to spend 4.056 nights on Cape Breton during their trip;
- Their visit to the museum falls exactly at the mid point in their Cape Breton trip;
- In most cases (50.3 percent), the decision to visit the museum was made at home, prior to embarking upon the trip;
- On average visitors expected to stay in the museum 85 minutes.

The main origin of visitors was the United States accounting for 35 percent (Figure 4-6). Ontario and Nova Scotia were the next most important origins at 22 and 21 percent, respectively.

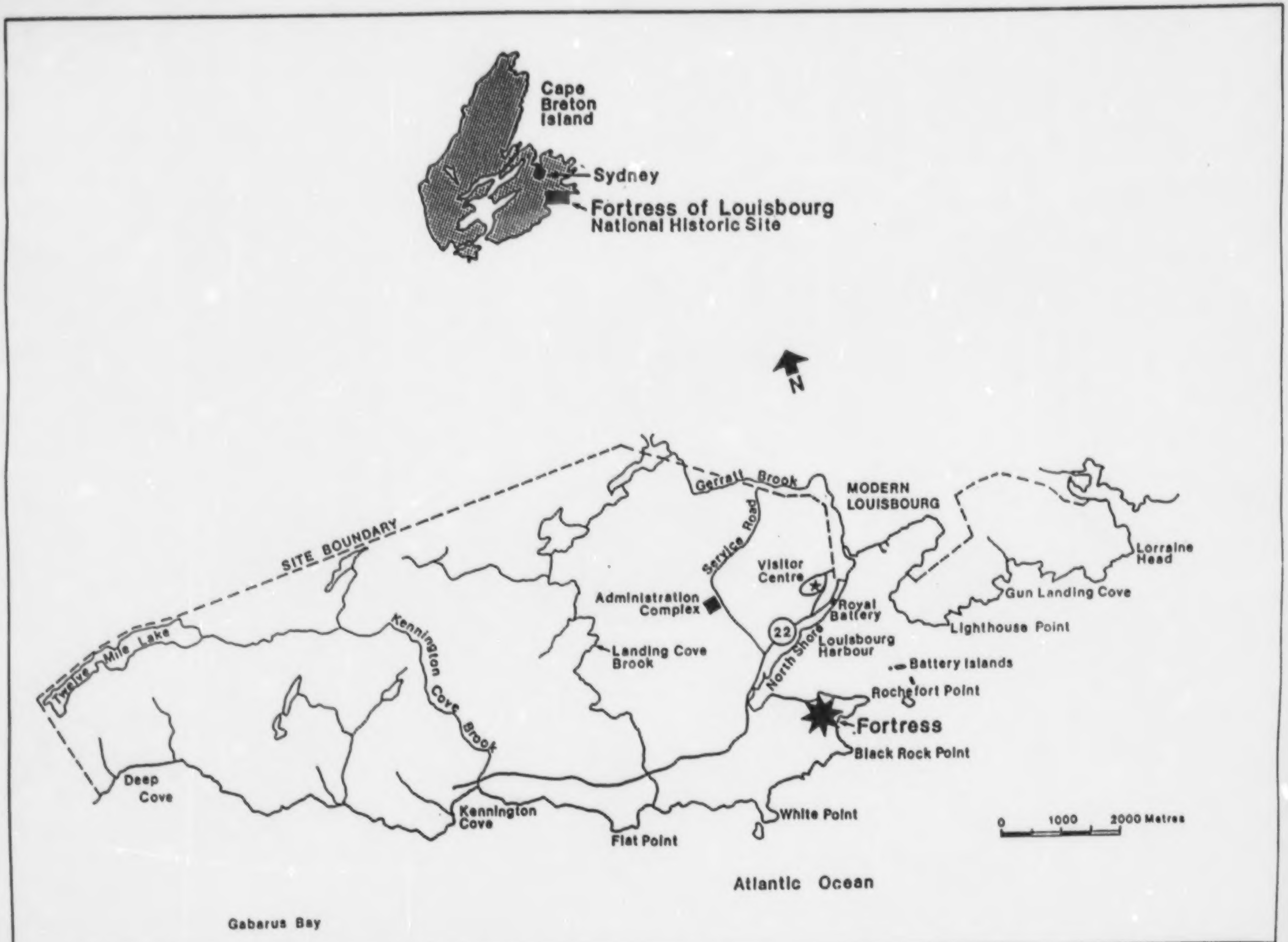
Figure 4-6: Origin of Visitors to Alexander Graham Bell National Historic Site, 1987



Source: Alexander Graham Bell National Historic Park 1987 Visitors Surveys, Resource Services International.

Fortress of Louisbourg

Located 35 km southeast of Sydney, the Fortress of Louisbourg contains the ruins and partial reconstruction of what was once the largest French fortress and naval base in North America. Visitors can explore the ruins of the town and fortress, which enclose an area of approximately 30 hectares. Over forty buildings now stand to provide visitors with a sense of what life was like in the eighteenth century. The


Cape Breton Island
Sydney
Fortress of Louisbourg
National Historic Site
N
SITE BOUNDARY
Gerrall Brook
MODERN LOUISBOURG
Service Road
Visitor Centre
Administration Complex
22
Royal Battery
Louisbourg Harbour
North Shore
Landing Cove Brook
Twelve Mile Lake
Kennington Cove Brook
Lorraine Head
Gun Landing Cove
Lighthouse Point
Battery Islands
Rochefort Point
Fortress
Black Rock Point
Deep Cove
Kennington Cove
Flat Point
White Point
0
1000
2000 Metres
Atlantic Ocean
Gabarus Bay

fortress is staffed by guides and interpreters, in addition to costumed animators. It is the highest rated attraction in Atlantic Canada by the world famous Michelin guide and the only one in the region to receive the guide's three star rating.

Visitor Use

The average annual attendance at the Fortress of Louisbourg National Historic Site between 1985 and 1989 was about 220,000 (Figure 4-7). Over this period, attendance grew by about 2 percent per year. Expenditures made by visitors of the Fortress in the province of Nova Scotia were estimated at $4.9 million of which $425,000 were in the form of entrance fees to the Fortress itself in 1989.

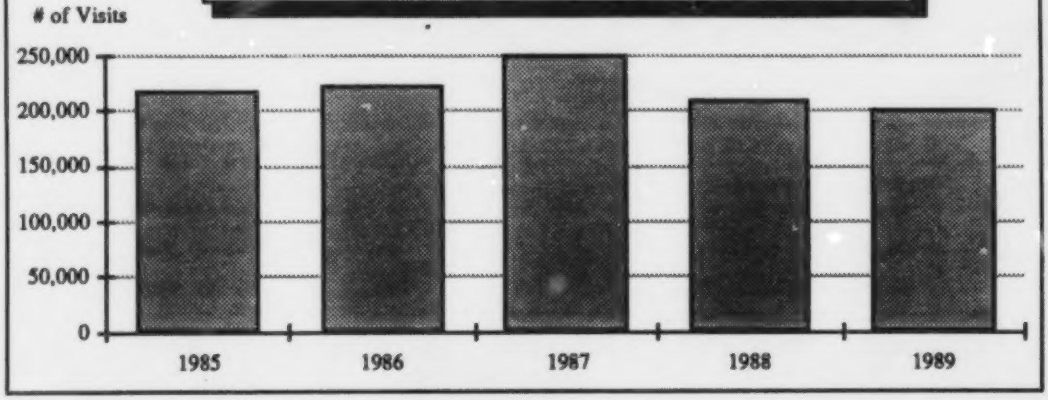
The park attracts visitors to all three of its main activity areas: the Fortress itself, a reconstruction of the 1700 French Fortress; Lighthouse Point (Havenside), a scenic lookout and historic lighthouse site across the harbour from the Fortress; and Kennington Cove, a beach and picnic area some distance down the coast from the Fortress. Park use statistics show the Fortress in 1989 was the most visited of the three sites with 130,000 recorded. This compares to the nearly 200,000 who visited the three areas combined.

A Summary of the 1989 Fortress of Louisbourg National Park Visitor Surveys surveyed a number of bus and non-bus tour visitors to the Fortress of Louisbourg. This showed the Fortress attracts visitors from a wide range of origins in reasonably evenly distributed proportions, in comparison with Lighthouse Point and Kennington Cove which are used predominantly by local residents. The average length of stay is about 5 hours.

Another 22 percent of all non-bus tour visitors to the Fortress of Louisbourg visited Lighthouse Point. About 32 percent of these visitors came from Cape Breton. Their average length of stay at Lighthouse Point is about half an hour. Local people tend to use the site as a lookout for weather and marine conditions, to locate boats, or as a place to visit when "out for a drive". Non-local visitors are more likely to view the Point as a heritage location and an opportunity to climb the rocks and enjoy the ocean views and the waves.

About 12 percent of those surveyed visited Kennington Cove. The Cove is used predominantly by local people (76 percent). Other visitors are frequently exploring the area or have been told about the Cove by local residents. The Cove is considered superior to some other Cape Breton Beaches. Most visitors come to the Cove for beach-related activities and are satisfied with most facilities and services offered. Visitors spent on average an hour and three quarters at Kennington Cove.

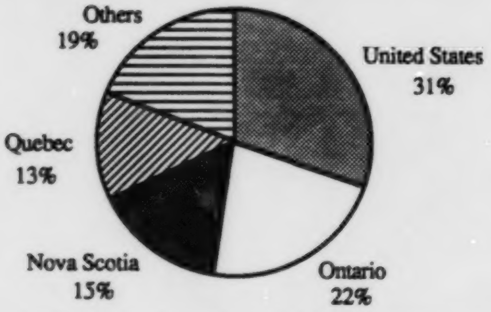
Figure 4-7: Fortress of Louisbourg Historic Site Annual Attendance Visits, 1985 to 1989



Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

About 30 percent of visitors to the fortress are Americans (Figure 4-8). Ontario accounts for the next largest portion of visitors at 22 percent. The remaining visitors come from Nova Scotia (15 percent), Quebec (13 percent) and the other provinces (20 percent).

Figure 4-8: Origin of Visitors to Fortress of Louisbourg National Historic Site, Summer of 1989



Source: Summary of the 1989 Fortress of Louisbourg National Park Visitor Surveys, Canadian Parks Service.

Marconi

Located at Table Head, Glace Bay, this was the site of the first wireless station in Canada (1902-1904). The site honours Marconi's role in the development of today's network of global communications. Artifacts and the aerial towers' concrete bases are links with Marconi and with the work of other scientists and inventors who pioneered the technology.

Visitor Use

The number of visits to Marconi Historic Site was 5,705 in 1989. Since the site only opened in 1989, detailed information on visitor use characteristics is not available. Expenditures made by visitors in the Province of Nova Scotia attributable to their visit of the site were estimated at $80,000.

St. Peters Canal

Located 50 km northeast of Port Hawkesbury, St. Peters Canal has been considered an ideal site for fortifications and a centre of Cape Breton's fishing industry since the settlement was established in 1653. The site includes the canal, a number of ancillary buildings, as well as the site of the fortified settlement of Saint-Pierre and establishment of Nicholas Denys dating from 17th century. Construction of the canal to connect the Atlantic Ocean to the Bras d'Or Lakes, across a narrow isthmus began in 1854, but was not completed until 1869. The canal was enlarged in 1876-80, again in 1912-18, and is now about 805 metres long. The navigation season is from mid-May to mid-October.

Visitor Use

This site serves primarily as a short stopover (15 to 30 minutes) for tourists travelling between Port Hawkesbury and Sydney. It can attract up to several hundred local residents and tourists at times when a large yacht is passing through the canal.

Cape Breton National Historic Sites Regional Context

By national and international standards Cape Breton's national historic sites are outstanding attractions. Together with the national park, these sites are the major tourist attractions in Cape Breton. Well over 90 percent of tourists to the Island visit at least one of these parks, with the typical tourist visiting an average of two parks. Taken together, they represent a significant vacation opportunity and make Cape Breton a major tourism destination within the Atlantic region.

Information on CPS expenditures and CPS employment is only available for the Fortress of Louisbourg and the Alexander Graham Bell Museum. Information on expenditures made by visitors is available for these two sites as well as Marconi National Historic Site. Table 4-1 presents visitor and CPS expenditures made at four of Cape Breton's national historic sites in 1989.

Table 4-1
Visitor and CPS Expenditures at Cape Breton National Historic Sites, 1989

Type of Expenditure	Alexander Graham Bell	Fortress of Louisbourg	Marconi	Total Cape Breton National Historic Sites
Visitor	$3,000,000	$4,900,000	$80,000	$8,000,000
CPS				
Wages/Salaries	$280,000	$5,100,000	NA	$5,380,000
Goods/Services	$1,400,000	$2,360,000	NA	$3,760,000
Total	$1,680,000	$7,490,000	NA	$9,170,000
Total	$4,680,000	$12,390,000	NA	$17,070,000

About $5.1 of the $7.5 million in CPS expenditures allocated to the Fortress of Louisbourg went to pay the wages and salaries of CPS employees at the site. The remaining 35 percent went to purchase goods and services, necessary to operate, maintain and further develop the site. CPS was responsible for 136 person-years of employment at the Fortress, about 70 person-years of which was full time employment. In 1989, total visitor expenditures which may be attributed to their visit to the site was $4.9 million.

Almost $1.7 million in total CPS expenditures were made at Alexander G. Bell, $280,000 was expended on wages and salaries and the remainder ($1.4 million) on goods and services. CPS was directly responsible for 7 person-years of employment (6 of these were employed on a full time basis) at Alexander Graham Bell. Expenditures made by visitors in the province of Nova Scotia attributable to their visit of Alexander Graham Bell Historic Site was estimated at $3.0 million.

Grassy Island

The settlement of Canso developed on the mainland early in the 19th century. It became a prosperous fishing village and gained prominence after the establishment of overseas telegraph cable stations in the 1880s. Although some of the outer islands were used as fishing stations in the 19th century, Grassy Island remained unoccupied. It is now a protected National Historic Site and was opened to the public in June 1990. Interpretation deals with the role of Canso area in international fishing industry, focusing on 17th and 18th centuries and the occupation of Grassy Island by the British during the struggle for North America 1720-1750.[8]

4.3.2 Southwestern Nova Scotia National Historic Sites

Four national historic sites are in the region of Southwestern Nova Scotia, including: Fort Anne, Port Royal, Grand Pré, and Fort Edward.

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[8] Visitor data unavailable.

Fort Anne

Acquired in 1917, Fort Anne is the oldest continuously administered national historic site in Canada. Located in Annapolis Royal, 200 kilometres west of Halifax, the fort was built by the French between 1695 and 1708 to protect settlements around the Minas Basin. In 1710, the British gained possession and changed the name from Port Royal to Annapolis Royal. The town became the official capital of Nova Scotia after the Treaty of Utrecht (1713) ceded mainland Nova Scotia to the British. The site consists of:

- earthwork ruins (among oldest in National Historic Sites system);
- restored 1708 Powder Magazine (the oldest structure in system);
- an underground storehouse;
- a sally port;
- reconstructed 1797 Field Officers' Quarters;
- an underground remains of various building foundations from French and British periods;
- two 18th century British ravelings; and,
- artillery pieces from various periods.

Visitor Use

Between 1985 and 1989, attendance at Fort Anne averaged about 92,000 visit per year. Over this period, annual attendance at the site decreased at an average rate of about 4 percent a year. Expenditures made by visitors in the province of Nova Scotia attributable to their visit of Fort Anne Historic Site was estimated at $840,000.

Port Royal

Port Royal is located 210 km west of Halifax. The settlement was established in 1605 by Sieur de Monts and is one of the first European settlements in North America. Using local materials, the Port Royal Habitation was reconstructed in 1938-39 based on descriptions and drawings by Samuel de Champlain and Marc Lescarbot and an archaeological survey of the original foundations. It consists of buildings grouped around a central courtyard. Interpretation focuses on French exploration of Acadia and the establishment of Port Royal and also deals with subsequent Scottish establishment, French legacy and the reconstruction of Habitation.

Visitor Use

Approximately 65,000 visits are made to Port Royal each year. Since 1985, attendance at the site has increased by about 2 percent a year. Expenditures made by visitors in the province of Nova Scotia attributable to their visit of Port Royal was estimated at $600,000.

Grand Pré

The village of Grand Pré preserves the memory of the Acadians. A stone church of French design stands as a memorial to the Acadian culture. A bronze statue of the fictional heroine of Longfellow's poem "Evangeline" portrays the tragedy of deportation.

Visitor Use

Between 1985 and 1989, the average annual attendance at the site was about 100,000. Annual attendance over this period increased by about 4 percent per year. Expenditures made by visitors in the province of Nova Scotia attributable to their visit of Grand Pré was estimated at $912,000.

Fort Edward

The fort is located in Windsor, Nova Scotia, 76 km west of Halifax. It was built by the British in 1750 and named for Governor Edward Cornwallis. Built on a hill overlooking Avon and Windsor Rivers, the fort was intended to control overland communications to the Bay of Fundy and to overawe local Acadian community. In 1755, the fort was the centre for the expulsion of local Acadians. It was later garrisoned during the American Revolution and War of 1812. The site itself, consists of a blockhouse, the oldest survivor of this type of defensive structure in Canada and a small collection of artifacts. Interpretation focuses on role of Fort Edward in early defences of British Canada, Acadian expulsion and blockhouse architecture. Also interpreted is the Royal Windsor Agricultural Fair, the first of its kind in Canada.

Visitor Use

Between 1985 and 1989, an annual average 6,500 visits were made to Fort Edward National Historic Site. Over this period, attendance increased at an average annual rate of about 10 percent per year. Expenditures made by visitors in the province of Nova Scotia attributable to their visit of Fort Edward Historic Site was estimated at $48,000.

Southwestern Nova Scotia National Historic Sites Regional Context

European settlement of the Annapolis Valley region began at Port Royal under the leadership of Champlain, De Monts and Poutrincourt. The four historic sites in this region offer visitors the opportunity to appreciate the historical significance of earlier times. A replica of Port Royal was constructed in 1938-39 and today gives visitors a glimpse into the early history of settlement in Canada. Fort Anne, in Annapolis Royal, was the last of a succession of forts built to guard the colony and has also been restored. The area was ceded to the British in 1713, but it was not until 1755 that the Acadians were expelled. Longfellow's poem "Evangeline" and the national historic park at Grand Pré in Kings County are testimonies to this tragedy. Fort Edward served as the centre for the deportation of about 1,000 Acadians who refused to pledge allegiance to the British Crown.

Table 4-2 summarizes visitor and CPS expenditures at these four historic sites. In 1989/90, total visitor and CPS expenditures amounted to $3.5 million. Visitor expenditures to these four sites was $2.4 million. CPS made expenditures of $1.1 million, about 65 percent of which went for wages and salaries of CPS employees. In total CPS was responsible for about 22 person-years of employment at these four sites. About half of these were employed on a full-time basis in 1989.

Table 4-2
Visitor and CPS Expenditures,
Southwestern Nova Scotia National Historic Sites, 1989

Historic Site	Visitor Expenditures	CPS Expenditures
Fort Anne	$840,000	NA
Port Royal	$600,000	NA
Grand Pré	$910,000	NA
Fort Edward	$50,000	NA
Total	$2,400,000	$1,100,000

4.3.3 Halifax Metro National Historic Sites

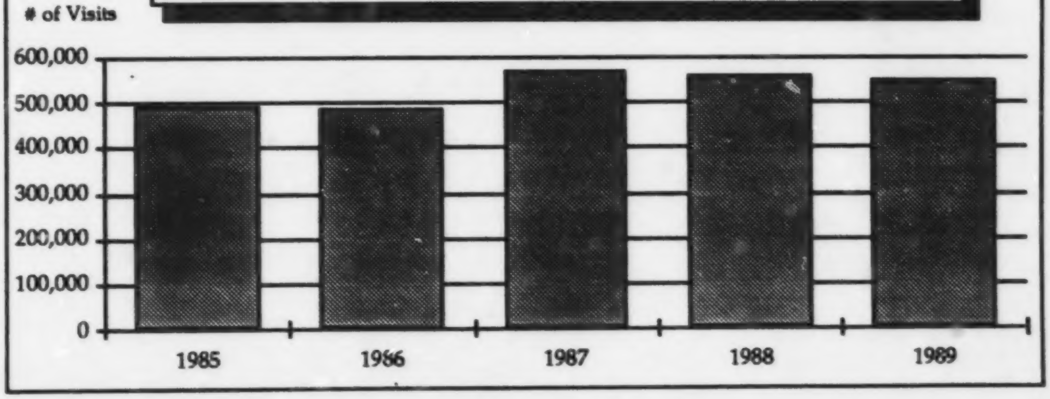
The Halifax Defence Complex is located in the Halifax Metro area. The Complex is a series of fortifications put in place to defend the Halifax Harbour: The Halifax Citadel; Prince of Wales Martello Tower; York Redoubt; Fort McNab; and, George's Island. There are no visitor service facilities at either Fort McNab or George's Island.

The Halifax Citadel is one of the major tourist attractions in Halifax. Within the Citadel are a variety of programs, exhibits and animated events available to visitors. Prince of Wales Martello Tower is accessible only by foot and is located within the boundaries of Point Pleasant Park. The site consists of a single martello tower which visitors can enter during operating hours. York Redoubt is located on the west side of the harbour 6 km from the centre of Halifax. Visitor facilities include numerous trails, an interpretive exhibit in the Fire Command Post and picnic tables at Sleepy Cove near the York Redoubt Battery.

Visitor Profile

Figure 4-9 shows annual attendance at three of the Halifax Defence Complex sites (Halifax Citadel, Prince of Wales Martello Tower and York Redoubt) between 1985 to 1989. Over a half a million visits are made to these three sites each year. Since 1985, attendance has remained quite stable.

Figure 4-9: Halifax Defence Complex Annual Attendance, Visits 1985 to 1989



Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

Halifax Citadel

The present Citadel, completed in 1856, is the fourth in a series of structures to have occupied this site since 1749, the year of the founding of Halifax. It is a key element in a complex system of defenses designed to protect the strategic port city. Situated on a hill overlooking the heart of downtown Halifax, the Citadel is one of the finest remaining examples of a bastioned fortification of its time and is a major attraction for visitors to this Atlantic seaport. The Citadel offers a spectacular view of the Halifax Harbour.

Visitor Use

The Halifax Citadel is the major HDC attraction. It draws the largest number of visitors of any of the HDC sites and is the most well-restored and interpreted. The location of the Citadel in downtown Halifax, together with its distinctive setting and construction, makes it a key feature of Halifax visited by tourists. The two main reasons cited by visitors when asked why they had visited the Citadel are history and sightseeing.

The typical visitor to the Citadel comes from outside Atlantic Canada and stays slightly less than 2 hours at the site. For most visitors their trip to the Citadel was either a planned stop on their vacation or the main destination. Fewer then 20 percent of visitors report their visit as being unplanned.

Fort McNab

Fort McNab is located on McNab's Island and is accessible only by private or charter boat. Although there are no visitor facilities or services at the fort, picnic tables and privies are available at nearby Maugher Beach and Back Cove.

Visitor Use

Information on the number of visits to Fort McNab is not yet collected by CPS. A recent study does, however, contain information on visitor characteristics. We know that only about 20 percent of all visitors are non-residents and the average length of stay for visitors at the fort itself is about 40 minutes. The difficulty in accessing McNab's Island discourages many from visiting Fort McNab.

Prince of Wales Martello Tower

The Prince of Wales Martello Tower is located within the boundaries of Point Pleasant Park in Halifax.

Visitor Use

For many, a visit to the tower is the result of a visit to Point Pleasant Park. Only 8 percent of all visitors indicated their visit was the main destination of their trip. The Tower is well known by local visitors but almost completely unknown by non-local visitors. Only 29 percent of the visitors had been in the Tower previously, even though over 40 percent were from the local area. The average length of stay for visitors is about 20 minutes.

York Redoubt

Situated on a high bluff overlooking the entrance to Halifax Harbour, this site features rifled muzzle-loading guns, historical displays, an information service and picnic facilities.

Visitor Use

Since 1989, the number of visits made to York Redoubt are in excess of 60,000. The typical visitor to York Redoubt is from Halifax Metro area. The typical visit is an unplanned excursion, lasting just over an hour. The site is a main destination for only 12 percent of visitors

Halifax Metro National Historic Sites Regional Context

The Halifax Defense Complex is an important element of the tourist infrastructure in the Halifax Metro area. It adds historical character to the varied tourist attractions in the Metro area. The city itself is a well developed urban area capable of accommodating a large number of visitors.

Table 4-3 summarizes visitor and CPS expenditures made at the Halifax Defence Complex in 1989. In 1989/90, visitors to the Halifax Defence Complex spent $5.9 million in the province of Nova Scotia. The Canadian Parks Service spent $3.1 million of which $2.3 million was expended to operate and maintain the sites. A further breakdown of the $3.1 million expenditures reveal that $1.3 million was spent on wages and salaries paid to CPS employees (this does not include, for example, payments of wages and salaries paid by the Army Museum and the security services contractor). In that year, CPS supported directly 40 person-years of employment at the Complex.

Table 4-3
Visitor and CPS Expenditures,
Halifax Defence Complex, 1989

Visitor Expenditures	$5,900,000
CPS	
Wages and Salaries	$1,300,000
Goods and Services	$1,800,000
Total	$3,100,000
Total	$9,000,000

4.4 Importance of Nova Scotia's National Parks and National Historic Sites as Visitor Attractions

As evidenced by the number of visits (Table 4-4), Nova Scotia's two national parks and series of historic sites are important elements of the province's tourist industry. Total attendance is around 1.8 million visits per year. About two thirds of these visits are made to historic sites.

Table 4-4
Total Visits to National Parks and Historic Sites in Nova Scotia
1985 to 1989

Year	National Parks	Historic Sites (1)	Total
1985	580,095	1,160,512(2)	1,740,607
1986	557,122	1,112,525(2)	1,669,647
1987	601,105	1,281,271(3)	1,882,376
1988	623,046	1,247,199(3)	1,870,245
1989	622,807	1,201,030	1,823,837

(1) Does not include attendance to St. Peters Canal, Grassy Island, Fort McNab, or Prince of Wales Martello Tower.
(2) Does not include attendance to York Redoubt and Marconi.
(3) Does not include attendance to Marconi.
Source: Environment Canada, *Atlantic Region Park Use Statistics 1984-1989*.

Nova Scotia's tourism strategy seeks to encourage travellers to visit the province, extend their length of stay and encourage residents to spend their vacation in the province. To achieve these objectives the strategy is structured around four basic subjects – touring, outdoors, meeting and conventions, and travel trade. The tourism products offered at Nova Scotia's national parks and historic sites are consistent with the emphasis put on both touring and the outdoors and are in a position to contribute to the strategy's objectives. Cape Breton Highlands appeals to those interested in touring the Cabot Trail. The park has demonstrated it can draw non-resident visitors to the province. Judging by the present use of Kejimkujik National Park, this CPS facility plays a role in encouraging residents of the province to vacation in Nova Scotia. The national historic sites offer visitors the opportunity to experience the province's heritage and explore its culture.

4.5 Impacts of Visitor Spending in Nova Scotia

In 1989, national parks and historic sites in Nova Scotia recorded over 1.8 million party-visits. In total, $35 million of expenditures on goods and services in the Nova Scotia economy can be attributed to the CPS site visits. Non-Nova Scotia residents accounted for just over 75 percent of these expenditures.

In comparison with other Atlantic Provinces, Nova Scotia's CPS sites recorded the highest level of both overall visitor expenditure and non-resident expenditure. This is explained by two main factors. First, CPS operates 14 different parks and historic sites in Nova Scotia, more than double any of the other Atlantic Provinces. And second, three of the more highly developed historic sites in the region are located in Nova Scotia (Fortress of Louisbourg, Alexander Graham Bell Museum and the Halifax Defence Complex). The operation of these three historic sites also explains why in Nova Scotia the visitor expenditure attributable to the historic sites represents almost 50 percent of all CPS visitor expenditures.

The distribution of visitor expenditures by main industry is set out in Table 4-5. In Nova Scotia, expenditures made on commodities in the food and beverage industry accounted for 33 percent of visitor spending. The second most important sector was accommodation services at 26 percent. Other retail ranked third with 18 percent.

Table 4-5
Expenditures (1) made by Visitors at National Parks and Historic Sites in Nova Scotia by Industry (2) 1989

Industry	Expenditures
Transportation	$5,600,000
Food and Beverage	$11,500,000
Accommodation	$9,200,000
Entertainment	$2,800,000
Other Retail	$6,200,000
Total	**$35,300,000**

(1) Including resident spending.
(2) Revenues collected by CPS from park visitors for such things as entrance fees or campground fees were deducted from overall visitor expenditures. Appendix II indicates the level of revenues collected of each park.

The economic impacts attributable to these expenditures are shown in Table 4-6. Total impacts from visitor expenditures are estimated to account for $21.4 million of Nova Scotia's Gross Domestic Product, as well as $14.4 million worth of labour income and 609 person-years of employment.

4.6 Impacts of CPS Spending on the Nova Scotia Economy

In 1989-90, the Canadian Parks Service spent $36.3 million developing and operating national parks and historic sites, as well as the Atlantic Regional Office, in Nova Scotia. These expenditures were split evenly between wages and salaries, and goods and services. This was about 52 percent of all CPS expenditures in the Atlantic region. Several factors account for this: first about $12.3 million of those expenditures are associated with the operation of the Atlantic Regional Office. Secondly, as noted before, there are twice as many sites in Nova Scotia as in any other Atlantic province. And third, several of the historic sites such as the Halifax Defence Complex, and the Fortress of Louisbourg, are highly developed and have very significant operating and maintenance budgets.

Table 4-6
Impacts of Visitor Expenditures on the Nova Scotia Economy, 1989

	Direct	Spin-off	Total
National Parks			
Kejimkujik			
Employment (P-Ys)	11.60	6.90	18.50
Labour Income	$250,000	$190,000	$440,000
NS GDP	$413,000	$330,000	$743,000
Cape Breton Highlands			
Employment (P-Ys)	190.0	113.4	303.4
Labour Income	$4,160,000	$3,050,000	$7,210,000
NS GDP	$5,960,000	$4,680,000	$10,640,000
Historic Sites			
Alexander Graham Bell/ Marconi			
Employment (P-Ys)	32.5	20.2	52.7
Labour Income	$713,000	$526,000	$1,239,000
NS GDP	$1,041,000	$819,000	$1,860,000
Fortress of Louisbourg			
Employment (P-Ys)	51.3	31.9	83.2
Labour Income	$1,128,000	$831,000	$1,959,000
NS GDP	$1,645,000	$1,295,000	$2,940,000
Halifax Defense Complex			
Employment (P-Ys)	66.87	39.94	106.83
Labour Income	$1,450,000	$1,070,000	$2,520,000
NS GDP	$2,090,000	$1,640,000	$3,730,000
Southwest Nova Scotia			
Employment (P-Ys)	27.54	16.45	43.99
Labour Income	$600,000	$440,000	$1,040,000
NS GDP	$860,000	$680,000	$1,540,000
Total Parks and Sites			
Employment (P-Ys)	**379.8**	**228.8**	**608.6**
Labour Income	**$8,300,000**	**$6,107,000**	**$14,408,000**
NS GDP	**$12,009,000**	**$9,444,000**	**$21,453,000**

The economic impacts resulting from the Canadian Parks Service expenditures are summarized in Table 4-7. The table shows that total CPS spending resulted in $39.3 million in GDP, most of which (76 percent), was in labour income. It should be noted that though the impacts associated with the operation of the regional office are contained in these numbers, the services offered by the office benefit all the sites in the region. Two sites; Cape Breton Highlands National Park and the Fortress of Louisbourg account for about 47 percent of the total impacts.

Overall, every CPS dollar in expenditure resulted in about $1.09 in provincial GDP. This compares very favourably with $.98 in Newfoundland, and $.97 in New Brunswick. There are a number of reasons for this. Unlike the other Atlantic Provinces, the wages and salaries component of CPS expenditures is highest in Nova Scotia. Wages and salaries made up 53 percent of total expenditures in 1989-90. This means that overall direct impacts are higher in Nova Scotia.

In terms of leakages, information from the individual parks and sites suggests comparable portions of expenditure are made in province as in other provinces[9]. Moreover, the relatively more developed provincial economy results in lower import contents in most goods when compared to other Atlantic Provinces. This fact resulted in relatively higher impacts.

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[9] Nova Scotia, received a net inflow of CPS spending from a regional perspective. This inflow (an estimated $.8 million), means that the impacts shown would tend to be understated. As a percentage of total spending, an estimated 8 percent of CPS spending on parks and historic sites in Nova Scotia leaks outside the region. In the net, therefore, the Nova Scotia results will tend to be overstated.

Table 4-7
Impacts of CPS Spending at Individual Heritage Locations on the Nova Scotia Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
Kejimkujik				
Wages and Salaries	$1,400,000	51.4	$1,800,000	$2,200,000
Good and Services	$800,000	6.6	$200,000	$300,000
Total	$2,200,000	58.0	$2,000,000	$2,500,000
C.B. Highlands				
Wages and Salaries	$3,100,000	127.2	$4,100,000	$5,100,000
Good and Services	$5,200,000	103.0	$2,400,000	$3,800,000
Total	$8,300,000	230.2	$6,500,000	$8,900,000
Alexander G. Bell				
Wages and Salaries	$1,400,000	11.1	$400,000	$500,000
Good and Services	$300,000	23.2	$600,000	$1,000,000
Total	$1,700,000	34.3	$1,000,000	$1,500,000
Fortress of Louisbourg				
Wages and Salaries	$5,100,000	189.2	$6,700,000	$8,400,000
Good and Services	$2,400,000	23.6	$600,000	$1,000,000
Total	$7,500,000	212.8	$7,300,000	$9,400,000
Halifax Defence				
Wages and Salaries	$1,300,000	54.1	$1,700,000	$2,200,000
Good and Services	$1,800,000	29.3	$700,000	$1,100,000
Total	$3,100,000	83.4	$2,400,000	$3,300,000
Southwest NS NHS				
Wages and Salaries	$700,000	29.3	$900,000	$1,200,000
Goods and Services	$400,000	3.4	$100,000	$100,000
Total	$1,100,000	32.7	$1,000,000	$1,300,000
Atl. Region Office				
Wages and Salaries	$6,200,000	211.7	$8,200,000	$10,200,000
Good and Services	$6,000,000	55.5	$1,400,000	$2,200,000
Total	$12,300,000	267.2	$9,600,000	$12,400,000
Total National Heritage Locations				
Wages and Salaries	**$19,200,000**	**674.0**	**$23.800,000**	**$29,800,000**
Good and Services	**$16,900,000**	**244.6**	**$6,000,000**	**$9,500,000**
Total	**$36,100,000**	**918.6**	**$29,800,000**	**$39,300,000**

(1) Including District Office.

4.7 Total Impacts of the CPS Program on the Nova Scotia Economy

The total impacts of the CPS program on the Nova Scotia economy in 1989-90 are set out in Table 4-8. Expenditures made by national parks and national historic site visitors and the Canadian Parks Service supported 1,527 person-years of employment resulting in $44.2 million of labour income. The CPS program accounted for $60.7 million of Nova Scotia's GDP.

Also shown in Table 4-8, is an assessment of the economic impacts resulting from individual parks and historic sites. Cape Breton Highlands National Park is the single most important site, accounting for 32 percent of total GDP impacts and 35 percent of the employment impacts. The Atlantic Regional Office accounted for about 17 percent of the employment impacts.

Table 4-8
Impacts of CPS and Visitor Spending at N.S. Heritage Locations on the Nova Scotia Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
CPS Spending				
Kejimkujik	$2,200,000	58.0	$2,000,000	$2,500,000
C.B. Highlands	$8,300,000	230.2	$6,500,000	$8,900,000
A.G. Bell	$1,700,000	34.3	$1,000,000	$1,500,000
Fortress Louisbourg	$7,500,000	212.8	$7,300,000	$9,400,000
Halifax Defence	$3,100,000	83.4	$2,400,000	$3,300,000
Southwest N.S. NHS	$1,100,000	32.7	$1,000,000	$1,300,000
Atl. Region Office	$12,300,000	267.2	$9,600,000	$12,400,000
Sub-Total	$36,200,000	918.6	$29,800,000	$39,300,000
Visitor Spending				
Kejimkujik	$1,250,000	18.5	$400,000	$700,000
C.B. Highlands	$17,850,000	303.4	$7,200,000	$10,600,000
C.B. Historic Sites	$8,000,000	136.0	$3,200,000	$4,800,000
Mainland N.S. NHS	$8,200,000	150.8	$3,600,000	$5,300,000
Sub-Total	$35,300,000	608.7	$14,400,000	$21,400,000
Total	**$71,500,000**	**1,527.3**	**$44,200,000**	**$60,700,000**

(1) Including District Office.

Note: Direct employment for each individual park is presented in Appendix II.

The input-output model indicates CPS related GDP as $60.7 million. Dividing this by the total Nova Scotia GDP indicates that the CPS program accounted for .38 percent of provincial GDP in 1989. Another useful ratio is the percent contribution of CPS visitor expenditures to total tourism receipts. In 1989, CPS visitors spent $35.3 million. This represents 4 percent of the total tourism receipts in the province in that year.

From a provincial perspective, these impacts might appear small. However, in some sub-provincial regions, the CPS program is an important generator of employment. About 60 percent (915 P-Ys) of the employment impacts (including spin-off) are associated with the CPS and visitor expenditures attributable to national parks and sites located on Cape Breton Island. The CPS sites directly employed 240 person-years and in addition, visitor spending generated 274 person-years of direct employment. These combined accounted for about one percent of total employment in Cape Breton in 1989.

Private sector induced investments are a part of overall impacts related to CPS operations attributable to parks and heritage sites. A recent study[10] commissioned by the Canadian Parks Service estimated the private sector induced effects attributable to the Cape Breton Highlands National Park over the two year period 1987 to 1989. The study attributes a total of nine construction projects with a value of $475,000 over that period, to the national park.

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[10] P.G Whiting and Associates, (December 1989) *Private Sector Construction Expenditures Induced by Selected National Heritage Locations in The Atlantic Region.*

5.0 PRINCE EDWARD ISLAND TOURISM INDUSTRY: OVERVIEW

Tourism is the most important sector in the Prince Edward Island economy. It ranks first among industries in terms of its contribution to provincial Gross Domestic Product (about 8 percent of GDP) and is an important generator of employment, providing 3,100 direct jobs.

Over 600,000 tourists visit the island each year, about five times its total population. The *1989 Prince Edward Island Tourist Exit Survey* provides a profile of these non-resident tourists.

- About 56 percent (350,000) of all non-residents who visited Prince Edward Island in 1989 were from the three other Atlantic Provinces. Another 26 percent (160,000) came from Central Canada, and 15 percent (95,000) from the United States;
- General sightseeing (38 percent) and visiting friends and relatives (20 percent) are the two most popular reasons for visiting Prince Edward Island. The typical visitor stays about 5 nights on the Island;
- Over 75 percent of all non-resident tourists coming to the Island visit the Prince Edward Island National Park;
- About 1 visitor in 4 camps overnight on Prince Edward Island.

Prince Edward Island is a renowned tourist vacation destination. The island is the main vacation destination for 3 out of every 4 visiting tourists. Beautiful scenery, warm water beaches and the island's legacy as the birthplace of Canadian Confederation and Green Gables House are the cornerstones of Prince Edward Island tourism. The typical vacation might involve a drive around the island, a visit to one of the island's famous beaches or a trip to one of the province's historic sites.

The Island's only national park (Prince Edward Island National Park) and three historic sites (Ardgowan, Fort Amherst/Port La Joye and Province House) are important parts of the province's tourist package. The national park is the most visited tourist facility in the province, attracting about 75 percent of all non-resident tourists. The Cavendish area is the main vacation destination for about 20 percent of all non-resident tourists. The historic sites are less popular but still attract a sizeable number of visitors each year.

5.1 Prince Edward Island National Park

Prince Edward Island National Park is located in Queen's County, 24 kilometres north of Charlottetown. Stretching about 40 kilometers along the north shore facing the Gulf of St. Lawrence, the park is one of the smallest but one of the most popular of Canada's National Parks. The irregular coastline is punctuated by long sand spits and beaches. The sand dunes, red sandstone cliffs, salt marshes and barachois ponds grace some of the finest beaches in Atlantic Canada. Popular park activities include swimming, hiking, cycling, clam digging and boating.

Green Gables House is located at the western end of the park in Cavendish. This charming farmhouse is known internationally through Lucy Maud Montgomery's classic novel "Anne of Green Gables", as the house where "Anne" lived.

Visitor Use

Most tourists visit Prince Edward Island National Park because of the beaches. Over 75 percent of all park visitors either swim or sunbathe at one of the park's four supervised beaches. Most are day users who come to spend an afternoon at the beach, and stay in accommodations outside the park. Owing to the limited number of campsites, high camping occupancy rates during July and August and an abundance of accommodation facilities in the park area, only a small portion of the park's visitors (8 percent) stay overnight in the park.

Although the ratio of overnight to day users at the park is low, more party nights are recorded at the park's campgrounds than at any other national park in Atlantic Canada. Most of those who do stay in the park overnight come from either central Canada, Nova Scotia or New Brunswick. These guests average about three nights in the park.

Prince Edward Island National Park is the most visited of all the national parks in Atlantic Canada. Between 1984 and 1988 attendance at the park averaged about 670,000 visits per year (Figure 5-1).[11] Since the beaches are the mainstay of the park, weather conditions are the most important factor determining how many people visit each year. This is evident by the attendance figures for 1986 and 1987. The number of visits made to the park in 1986, a year of bad summer weather, was about half the number made in 1987, when excellent weather conditions prevailed. Most park visits (65 percent) are recorded in the peak months of July and August, when the weather and water are the warmest. Another 25 percent of all visits are made during the shoulder season months of May, June and September when the weather is still quite warm.

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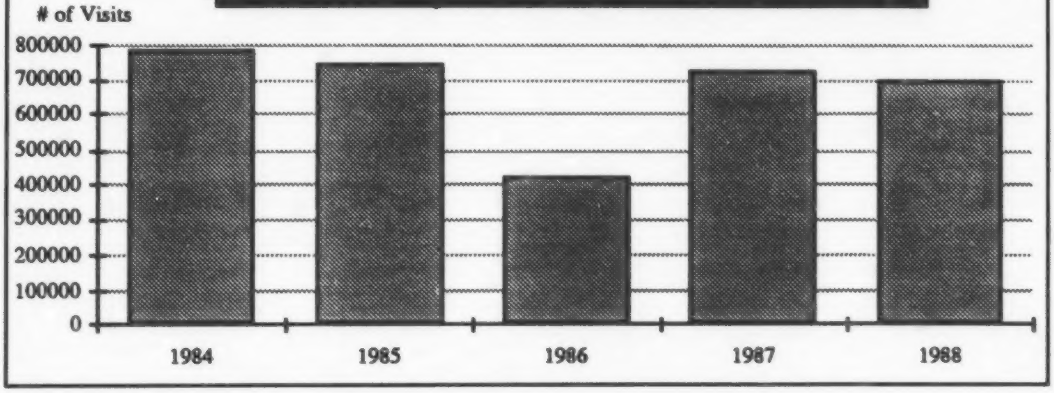
[11] Attendance figures for 1989 are unavailable.

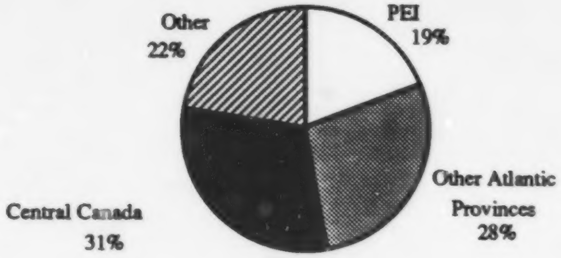
Figure 5-1: Prince Edward Island National Park Annual Attendance: Visits, 1984 to 1988



Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

About 60 percent of visitors to the park are either from Central Canada or one of the two adjacent Atlantic Provinces (New Brunswick and Nova Scotia) (Figure 5-2). Another 20 percent of visitors are residents of Prince Edward Island. Almost all of the park's resident visitors and most Canadian visitors had visited the national park on a previous occasion.

Figure 5-2: Origin of Visitors to Prince Edward Island National Park, Summer 1987



Source: Prince Edward Island National Park Visitor Survey, Canadian Parks Service.

Regional Context

Prince Edward Island National Park is unique in the Atlantic region in that a major service infrastructure has emerged outside of the park. The infrastructure provides visitors a variety of accommodation, food services and entertainment. Although accommodation and food services are also provided within the park, they occupy a relatively small proportion of the total supply in the Cavendish area. Only 2 percent of the roofed accommodation and 20 percent of the campsites are available within the park. The remaining accommodation facilities are in and around the park area. As a result most visitors stay outside the park and drive or walk in each day. About 40 percent of tourists visiting the park either stay overnight in the park or in the park region. Man-made tourist attractions in the surrounding park area include: Rainbow Valley, the Royal Atlantic Wax Museum and the Sandspit.

The local economy benefits from visitor spending and expenditures made by the Canadian Parks Service in developing, maintaining and operating the park. Total visitor and CPS expenditures is in the \$30-\$32 million range. In 1989, visitors to the park spent an estimated \$26 million attributable to their visit in the province of Prince Edward Island. The amount of CPS spending on the park is unavailable, but it is safe to assume that most of the \$6.3 million the service spent in the Prince Edward Island district was allocated to the national park.

Canadian Parks Service was directly responsible for about 64 person-years of employment at Prince Edward Island National Park.

5.2 Prince Edward Island National Historic Parks and Sites

The Canadian Parks Service operates three national historic sites in Prince Edward Island: Ardgowan, Fort Amherst/Port La Joye and Province House.

Ardgowan National Historic Site

Located 2 kilometres from Charlottetown, Ardgowan was the home of William Henry Pope, one of Prince Edward Island's Fathers of Confederation. The exterior of the house has been restored to period, while the interior serves as the Canadian Parks Service District Headquarters for Prince Edward Island. The grounds are open from June to October.

Fort Amherst/Port La Joye National Historic Site

This site, located 16 kilometres east of Charlottetown, overlooks the Charlottetown harbour and bay. Port La Joye, the first French capital of Ile Saint-Jean (Prince Edward Island), and Fort Amherst, built by the British after they won control of the island in 1758, are the highlights of Fort Amherst/Port La Joye National Historic Site. Today only the earthworks of Fort Amherst remain visible. There are picnic grounds in the park and the grounds are open year-round. Interpretation focuses on roles of Port La Joye and Fort Amherst in the settlement and development of Prince Edward Island, 1720-99, with minor emphasis on military life in imperial outpost, 1726-68, and on the role of the site in defending the harbour.

Visitor Use

Between 1985 and 1988, attendance at Fort Amherst/Port La Joye has more than doubled. In 1989, the number of visits doubled again over the previous year. This was attributed to a major Boy Scout Jamboree that was held at Fort Amherst. Total visitor spending in the province of Prince Edward Island associated with a visit to Port La Joye is estimated at $408,000 in 1989 (see note under Table 5-3).

Province House National Historic Site

The birthplace of Confederation and the seat of Prince Edward Island's provincial legislature since 1847, Province House stands as a significant example of Canada's architectural heritage and a national historic landmark. Canadian Parks Service has restored the exterior and parts of the interior much as they were in 1864. Guided tours and audio-visual presentation interpret the birth of Canadian Confederation, and the architecture, history and setting of the building.

Visitor Use

Attendance at Province House has increased dramatically since 1985. Between 1985 and 1989, attendance grew at an average rate of about 14 percent per year. In 1985 and 1986, annual attendance averaged about 90,000 visits. Currently more than 130,000 visits are made each year. Total visitor spending in the province of Prince Edward Island associated with a visit to Province House is estimated at $1.3 million for 1989.

Prince Edward Island National Historic Sites Regional Context

Prince Edward Island's national historic sites are either located in or close to Charlottetown: Province House and Ardgowan are in Charlottetown, while Fort Amherst/Port La Joye, off Route 19 overlooks Charlottetown harbour. Thus, most visitor expenditures attributable to the historic sites are spent within greater Charlottetown. The city is a well-developed urban centre, offering visitors a variety of restaurants, and accommodation and shopping facilities.

Visitors to the historic sites spent $1.7 million in 1989, mostly on groceries and accommodations (64 percent) in the areas around the heritage locations.

Canadian Park Service provided 3.17 person-years of employment in Fort Amherst, 2.49 in Province House, and 14.14 in Prince Edward Island district office.

5.3 Importance of the National Park and National Historic Sites as Visitor Attractions

As evidenced in Table 5-1, Prince Edward Island's National Park and Historic Sites are major tourist attractions in the province. With the exception of 1986, total attendance has remained quite stable (between 850,000 to 900,000 visits per year). The Cavendish area is the most heavily visited region and the National Park, the single most popular tourist attraction on the island. The province's historic sites have also proven to be popular among tourists.

Table 5-1
Total Visits to National Parks and Historic Sites in Prince Edward Island
1985 to 1989

Year	P.E.I. National Park	Historic Sites[1]	Total
1985	743,539	107,242	850,781
1986	420,162	119,808	539,970
1987	722,075	164,279	886,354
1988	692,796	211,523	904,319
1989	N/A	219,982	N/A

(1) Does not include number of visits made to Ardgowan Historic Site.
Source: Environment Canada, *Atlantic Region Park Use Statistics 1984-1989.*

Prince Edward Island's national park and historic sites embody elements upon which the province's tourism industry was built and are major reasons why the island is a major tourist destination. The province's tourism strategy, *Tourism 2000*, was developed as a guide for the future development of the industry in Prince Edward Island. It aims at increasing the number of visitors by three percent per year. To accomplish this goal the strategy proposes to distribute tourism more widely through space and time. Increased peak season development is to be oriented toward the eastern and western portions of the Island. An active approach to developing the shoulder seasons island-wide is also to be initiated.

Presently, most of the tourist activity on the island is concentrated in the central part of the province in the vicinity of the national park. During the peak season, the area around the national park is already heavily utilized by tourists and will continue to be a popular destination. The provincial strategy is aimed at distributing the benefits of tourism to other regions of the province. Therefore, the national park is not likely to play a significant role in this aspect of the provincial strategy. However, the park will play a role in the aspect of developing more activity during the shoulder season.

5.4 Impacts of Visitor Spending in Prince Edward Island

The Prince Edward Island national park and historic sites attracted over 900,000 visitors in 1988[12]. In total, the visitors are estimated to have spent $27.4 million on goods and services in the Prince Edward Island economy as a result of their visits to CPS sites. Non-Island residents accounted for over 90 percent of these expenditures. This was the highest proportion of non-resident expenditures recorded in the four Atlantic Provinces.

The distribution of visitor expenditures by main industry is set out in Table 5-2. Expenditures made on commodities in the food and beverage industry was the largest component at about 39 percent. Accommodation services attracted the next highest amount at 24 percent. In percentage terms, the Prince Edward Island transportation sector attracted the lowest level of spending - at just 13 percent among the four Atlantic Provinces. The fact Prince Edward Island is Canada's smallest province in geographic terms and that visitor attractions tend to be fairly concentrated, explains the lower level of spending in this sector.

Table 5-2
Expenditures (1) made by Visitors at National Parks and Historic Sites in Prince Edward Island by Industry (2) 1989

Industry	Expenditures
Transportation	$3,550,000
Food and Beverage	$10,717,000
Accommodation	$6,683,000
Entertainment	$2,470,000
Other Retail	$4,004,000
Total	**$27,424,000**

(1) Including resident spending.
(2) Revenues collected by CPS from park visitors for such things as entrance fees or campground fees were deducted from overall visitor expenditures. Appendix II indicates the level of revenues collected at each park.

The economic impacts attributable to these expenditures are shown in Table 5-3. Total impacts from visitor expenditures are estimated to account for $14.8 million of

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[12] Data for 1989 was not available, 1988 data was used as a proxy for 1989.

Prince Edward Island's Gross Domestic Product, as well as $9.3 million worth of labour income and 443 person-years of employment.

Table 5-3
Impacts of Visitor Expenditures on the Prince Edward Island Economy, 1989

	Direct	Spin-off	Total
National Parks			
Prince Edward Island			
Employment (P-Ys)	282.3	134.0	416.3
Labour Income	$5,481,500	$3,255,500	$8,736,000
P.E.I. GDP	$8,059,000	$5,817,000	$13,876,000
Historic Sites			
Fort Amherst (1)			
Employment (P-Ys)	4.3	2.0	6.3
Labour Income	$85,000	$50,000	$135,000
P.E.I. GDP	$123,000	$89,000	$212,000
Province House			
Employment (P-Ys)	13.9	6.6	20.5
Labour Income	$274,000	$162,000	$436,000
P.E.I. GDP	$400,000	$286,000	$686,000
Total Historic Sites			
Employment (P-Ys)	18.2	8.6	26.8
Labour Income	$359,000	$211,000	$570,000
P.E.I. GDP	$523,000	$375,000	$898,000
Total Parks and Sites			
Employment (P-Ys)	**300.5**	**142.6**	**443.1**
Labour Income	**$5,840,500**	**$3,466,500**	**$9,306,000**
P.E.I. GDP	**$8,582,000**	**$6,192,000**	**$14,774,000**

(1) Visitor spending impacts for Fort Amherst are based on the attendance recorded in 1990 – 41,000 visits. 1989 was an abnormal year in terms of visits due to the major Boy Scout Jamboree held there.

5.5 Impacts of CPS Spending on the Prince Edward Island Economy

The Canadian Parks Service spent $6.3 million developing and operating the national park and historic sites in Prince Edward Island in 1989-90.[13] A significant portion of those expenditures (46 percent), consisted of wages and salaries, and supported 84 person-years in direct (actual) employment. Business and personal services account for the largest portion (33 percent) of the expenditure on goods and services. Construction related activity accounted for the next largest portion (25 percent).

The economic impacts supported by the Canadian Parks Service 1989-90 expenditures are summarized in Table 5-4. The table shows that total CPS spending resulted in $5.8 million in GDP, most of which (76 percent), was in labour income. As well, CPS was responsible for 145 person-years of employment.

Table 5-4
Impacts of CPS Spending at National Parks and Historic Sites on the Prince Edward Island Economy, 1989-90

	Expenditures	Employment (person-years)	Labour Income	GDP
Wages & Salaries	$2,890,000	112.3	$3,640,000	$4,510,000
Goods & Services	$3,440,000	32.3	$780,000	$1,280,000
Total	**$6,330,000**	**144.7**	**$4,420,000**	**$5,790,000**

5.6 Total Impacts of the CPS Program on the Prince Edward Island Economy

The total impacts of the CPS program on the Prince Edward Island economy in 1989-90 are set out in Table 5-5. The program contributed $20.6 million to provincial GDP, roughly 67 percent of which was in the form of labour income. This represents about 1.1 percent of 1989 provincial GDP. As well, the program supported 588 person-years of employment.

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[13] Prince Edward Island had a net outflow of CPS spending from a regional perspective. This outflow , is estimated at about $1 million. Roughly 9 percent of total CPS spending leaked outside the region. Both these outflows result in an upward bias in the economic impacts estimates.

Table 5-5
Impacts of CPS and Visitor Spending at P.E.I. Heritage Locations on the Prince Edward Island Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
CPS Spending				
P.E.I. District	$6,330,000	144.7	$4,420,000	$5,790,000
Visitor Spending				
P.E.I. National Park	$25,697,000	416.3	$8,736,000	$13,876,000
Fort Amherst/Port La Joye	$408,000	6.3	$135,000	$212,000
Province House	$1,319,000	20.5	$436,000	$686,000
Sub-Total	$27,424,000	443.1	$9,307,000	$14,774,000
Total	**$33,754,000**	**587.8**	**$13,727,000**	**$20,564,000**

Also shown in Table 5-5 is an assessment of the economic impacts resulting from individual parks and historic sites. Most (72 percent) of the impacts were the result of visitor spending. The visitors of Prince Edward Island National Park accounted for 67 percent of total GDP impacts. In absolute terms, the total GDP visitor impacts ($15.5 million) is the highest in the Atlantic Region. This is mainly attributable to the fact that (as noted in Section 1.5), 85 percent of the estimated $27.4 million in visitor spending was accounted for by non-residents. This represents 20.5 percent of the total tourism receipts in the province in that year. The importance of the park as a visitor attraction in the region is already documented in Section 5.2. The existence of a well developed tourism infrastructure outside the park, promotes a high overall level visitor spending. Most of the expenditures are concentrated in the vicinity of the Prince Edward Island National Park. As well, most of the attendance occurs during the peak summer months.

It should be mentioned that a recent study[14] concluded that the Prince Edward Island National Park was responsible for $3.3 million[15] in private and public sector induced investment over the two year period 1987-89.

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[14] P. G. Whiting and Associates, (December, 1989) *Private Sector Construction Expenditures Induced by Selected National Heritage Locations in the Atlantic Region.*

[15] Previous economic impact data for Prince Edward Island does not include this source of impact.

6.0 NEWFOUNDLAND TOURISM INDUSTRY: OVERVIEW

The tourism industry in Newfoundland and Labrador makes an important contribution to provincial economic development. Among all industries, tourism ranks seventh in terms of its contribution to GDP, at a level of 4.8 percent. As well, it accounts for a substantial number of jobs (approximately 12,000) in the province.

The *Non-Resident Auto Exit Surveys: 1982-1988*, prepared by the provincial Department of Development provides a profile of visitors entering the province. Their findings include:

- About 80,000 people enter Newfoundland and Labrador by auto each year;
- One third of non-resident visitors (30,000) come to visit friends and relatives. Another one half of all non-residents (38,000) come to sightsee;
- About one third of non-resident tourists come from Ontario, another third comes for the three Maritime provinces and one quarter from the United States.

Newfoundland is not generally known as a tourist destination in the mainland markets. The industry faces a number of constraints which hamper development. The remote location and the cost of a vacation in Newfoundland dissuade many from vacationing there.

Despite the constraints, the province is growing in popularity as a tourist destination. Visitations increased by more than 80 percent between 1980 and 1987. Much of the success is attributed to the unique cultural experience, scenic beauty and historical significance of the province. Although it also acts as a constraint, the province's remote location gives it a distinct advantage in attracting certain segments of travellers, such as those seeking adventure/sport, and big game hunting. The extension of ferry service between North Sydney and both Argentia and Port Aux Basque is expected to have a positive impact on the number of auto attendances.

The province's two national parks and five historic sites are important parts of Newfoundland's tourism industry. Gros Morne is the most popular park among non-resident visitors coming to the province. It is the main destination of about 10 percent of all non-residents entering Newfoundland. Terra Nova is mostly used by residents as both a weekend and vacation destination. The province's historic sites add a rich element of character to the tourist industry.

6.1 Gros Morne National Park

Gros Morne National Park is located on the west coast of Newfoundland, 126 km north of Corner Brook. The park was established in 1973 and is one of the four major attractions on the Viking Trail [L'Anse aux Meadows, Port au Choix, and Red Bay Basque Whaling Site are the other three]. It covers an area of 1,805 square kilometers, including 72 kilometers of coastline. Gros Morne National Park is a UNESCO World Heritage Site. The Tablelands is a unique geological feature which, along with other features, led to this designation.

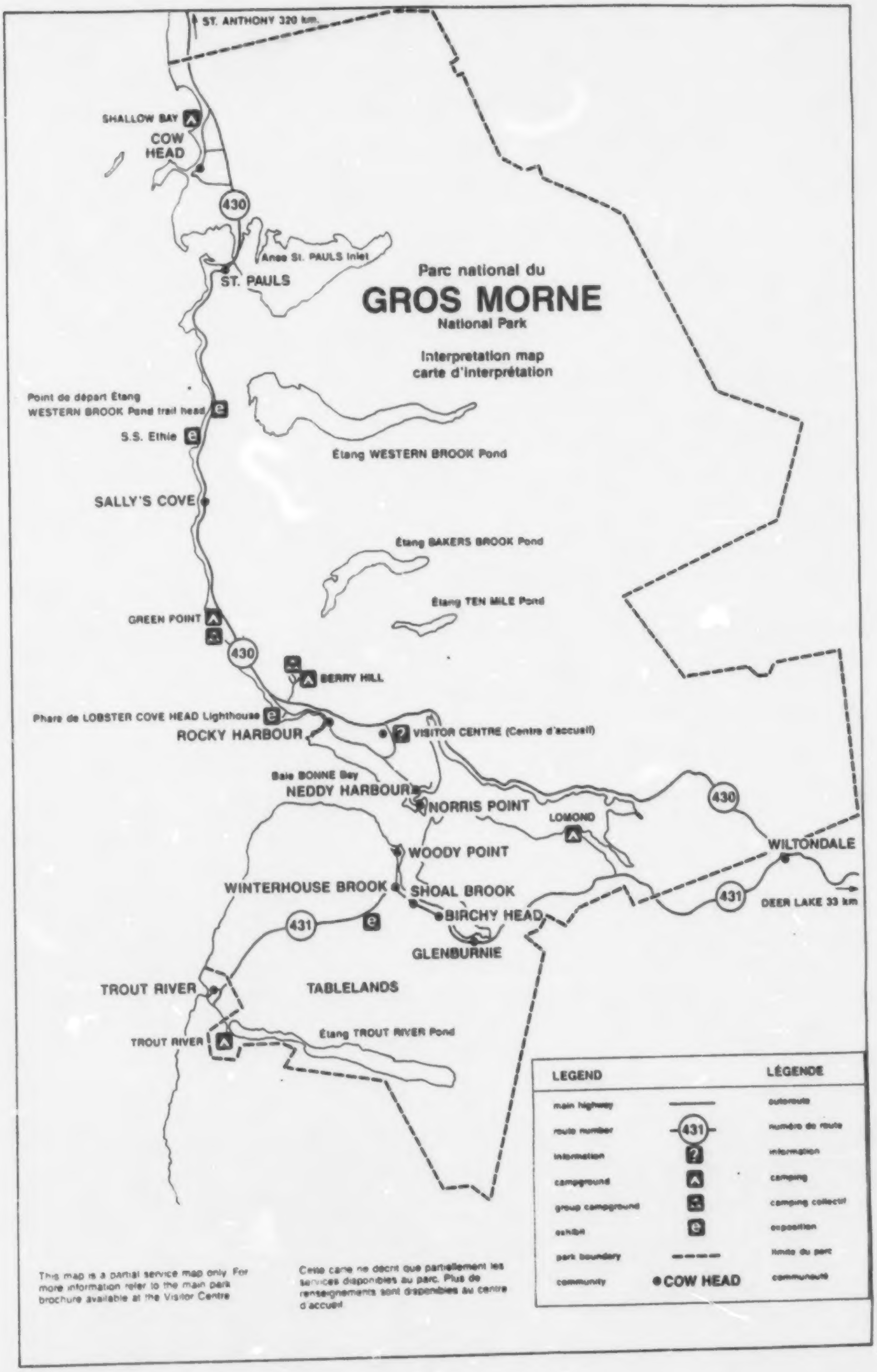
Visitor Use

Gros Morne is essentially a hiking park. About 30 percent of park visitors hike at one of the three major trails. Each trail offers visitors very different hiking experiences. Western Brook Pond Trail, the most popular among hikers, provides access to a boat tour. James Callaghan Trail leads to the top of Gros Morne Mountain. Green Gardens Trail is a backcountry route to a rugged coastal area.

The typical hiking party at Gros Morne consists of about 3 people. Depending on the trail used, the average hiker spends anywhere from three to seven hours hiking at the park. Most either stay overnight at one of the park's campgrounds or make use of commercial accommodation facilities in enclave communities.

With the exception of 1986, total attendance at Gros Morne increased each year since 1985, growing by an average of 5 percent per year (Figure 6-1). In recent years, attendance increased by roughly 12 percent a year. Currently about 100,000 visits are made to the park each year.

About 70 percent of park visits are made during the peak season (July and August). Another 25 percent of visits are made in the shoulder season. A relatively undeveloped winter program (in comparison to Terra Nova National Park) explains why less than 5 percent of visits are made in the off-season.


ST. ANTHONY 320 km
SHALLOW BAY
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Anse St. PAULS Inlet
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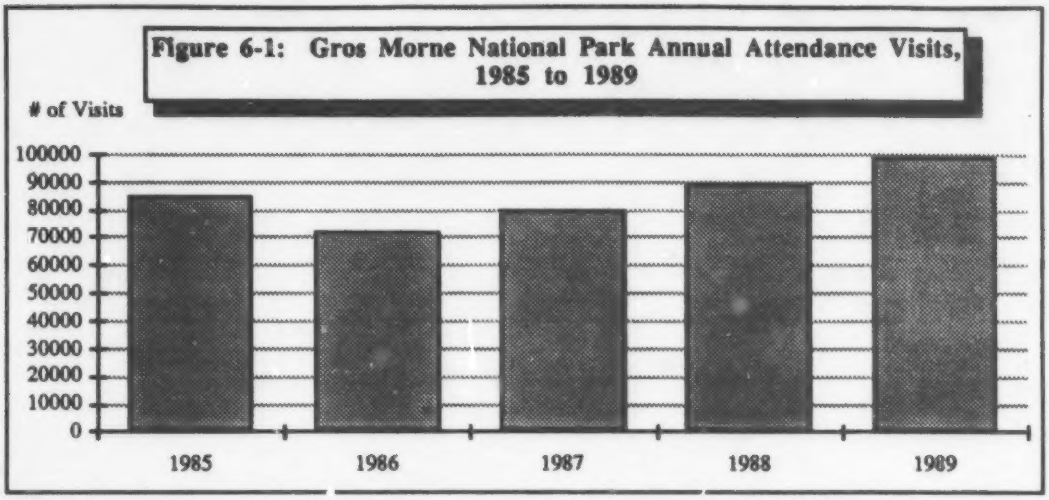
GROS MORNE
National Park
Interpretation map
carte d'interprétation
Point de départ Étang
WESTERN BROOK Pond trail head
S.S. Ethie
Étang WESTERN BROOK Pond
SALLY'S COVE
Étang BAKERS BROOK Pond
Étang TEN MILE Pond
GREEN POINT
430
BERRY HILL
Phare de LOBSTER COVE HEAD Lighthouse
ROCKY HARBOUR
VISITOR CENTRE (Centre d'accueil)
Baie BONNE Bay
NEDDY HARBOUR
NORRIS POINT
LOMOND
430
WILTONDALE
WOODY POINT
WINTERHOUSE BROOK
SHOAL BROOK
BIRCHY HEAD
431
431
DEER LAKE 33 km
GLENBURNIE
TROUT RIVER
TABLELANDS
TROUT RIVER
Étang TROUT RIVER Pond
LEGEND
LÉGENDE
main highway
autoroute
route number
431
numéro de route
information
?
information
campground
camping
group campground
camping collectif
exhibit
e
exposition
park boundary
limite du parc
community
COW HEAD
communauté

This map is a partial service map only. For more information refer to the main park brochure available at the Visitor Centre

Cette carte ne décrit que partiellement les services disponibles au parc. Plus de renseignements sont disponibles au centre d'accueil



Source: Atlantic Region Park Use Statistics 1985-1989, Canadian Parks Service.

Over half (54 percent) the park's visitors are residents of Newfoundland (Figure 6-2). About another 20 percent come from the United States. Most of the remaining 25 percent of visitors either come from Ontario or the Maritimes. Terra Nova, Newfoundland's other national park, attracts a much smaller portion of non-resident tourists. The reason for this is that compared to Terra Nova, Gros Morne does not have a nearby significantly populated local market segment.

On average, non-resident visitors stay about 3 nights in the park, either at one of the campgrounds or in enclave communities. Overnight resident visitors tend to stay about a day less than their non-resident counterparts. Most of the non-resident park users are first-time visitors. By contrast, only 20 percent of resident visitors are first timers.

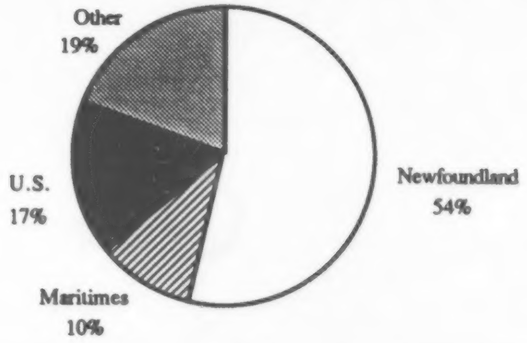


Figure 6-2: Origin of Visitors to Gros Morne National Park

Source: Gros Morne National Park Main Exit Traffic Partition Survey 1987, Canadian Parks Service.

Regional Context

The park is located on the major route to the northern peninsula and is part of the famous Viking Trail. The location of the park, just off the Trans-Canada Highway, and the existence of two national historic sites in the area (L'Anse aux Meadows and Port au Choix) explain why a large number of non-resident tourists visit each year. Many non-resident visitors tour the trail by car, visiting all three facilities.

The park region includes numerous enclave communities. Most have populations which range from 500 to 1,000. The park serves as an important source of income and employment for many of these local residents. Local businesses also benefit from the amount of money both park visitors and CPS spend in the area.[16]

Expenditures by visitors of Gros Morne in the province of Newfoundland in 1989 have been estimated at $3.6 million. CPS spent $9.6 million of which 70 percent went to purchase goods and services required to operate, maintain and develop the park. In 1989-90, total visitor and CPS expenditures associated with Gros Morne amounted to approximately $13.2 million. CPS was directly responsible for about 84 person-years of employment at Gros Morne.

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[16] The Canadian Parks Service is completing a study which estimates the local economic impact from visitor and CPS expenditures at Gros Morne.

6.2 Terra Nova National Park

Established in 1957, Terra Nova National Park is located 222 kilometres north of St. John's and 80 kilometres south of Gander. The park is located near small communities and towns with the Trans-Canada Highway running through the western sector of the park. The area around the park has a temperate climate due to the warm Gulf Stream current which flows past the east coast of Newfoundland. The Labrador Cold Current lends a chill to spring and summer months but provides excellent underwater visibility for scuba divers.

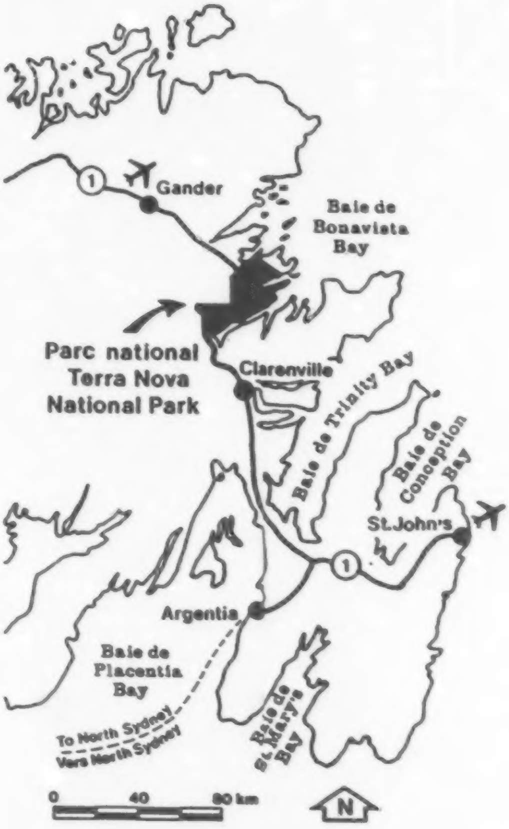
Visitor Use

Two recreational activities, hiking and swimming, explain why a large number of visitors come to Terra Nova each year. There are approximately 100 km of hiking trails in the park, varying in length and difficulty. About 6 out of every 10 visitors to the park hike the shorter walking trails at the park. Approximately 2 out of every 10 hike the longer trails. Swimming is also popular among visitors. About two thirds of all visitors use the facilities at Sandy Pond Beach.

Total annual attendance at Terra Nova is currently about 165,000 visits (Figure 6-3). Since the mid 1980s, park attendance fluctuated from a low of about 150,000 to 185,000 annual visits. The latter part of the 1980s witnessed a slight decline in attendance levels.

About 40 percent of all visits to the park are made during the peak months of July and August. The remaining 60 percent of visitors come either in the shoulder or off-season. Most shoulder/off-season visitors are residents from St. John's metropolitan area. The park's winter program is quite popular and is growing in appeal. The park ranks first among national parks in Atlantic Canada in terms of the proportion of visits made during the off-season. Many of the park's trails are ideal for snowshoeing and some are groomed for cross-country skiing.

Terra Nova National Park Regional Setting


1
Gander
Baie de Bonavista Bay
Parc national Terra Nova National Park
Clarenville
Baie de Trinity Bay
Baie de Conception Bay
St. John's
1
Argentia
Baie de Placentia Bay
To North Sydney
Vers North Sydney
Baie de St. Mary's Bay
0
40
80 km
N

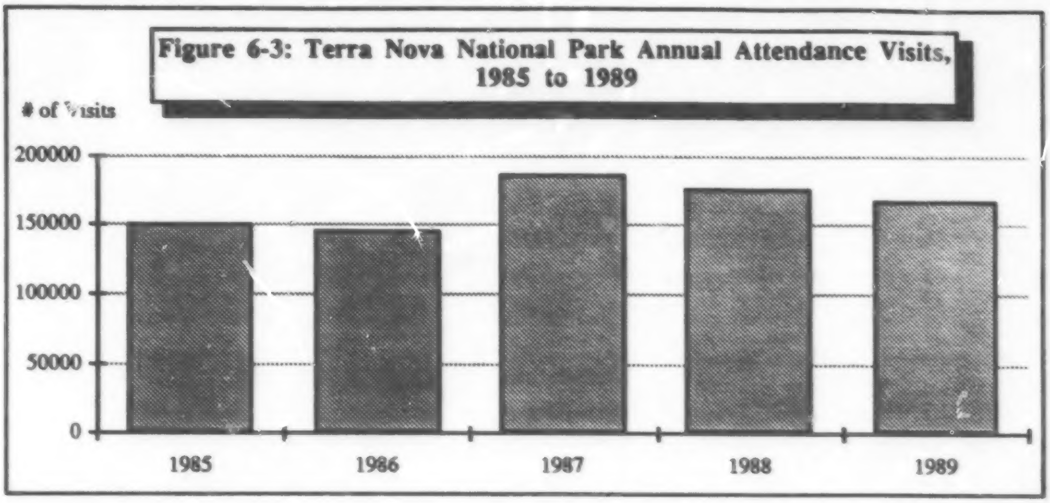


Figure 6-3: Terra Nova National Park Annual Attendance Visits, 1985 to 1989

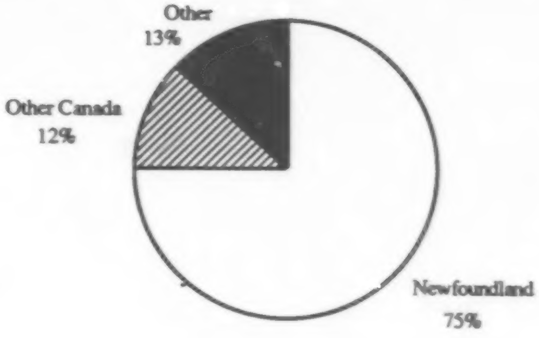
Source: Atlantic Region Park Use Statistics 1984-1989, Canadian Parks Service.

The origin of park visitors is shown in Figure 6-4. Three quarters of all park users are residents of Newfoundland. Comparisons between Terra Nova and Kejimkujik are striking. Both service a large portion of resident visitors, many visitors to each park camp overnight (79 percent in Terra Nova compared to 70 percent in Kejimkujik) and both parks are close to significant population centres.

Regional Context

There are 22 communities in the immediate area surrounding Terra Nova National Park. The park is bounded by Glovertown, Traytown, Eastport and Happy Adventure to the north, Charlottetown to the east, Terra Nova to the west and Port Blandford to the south. Most are small with populations under 500. Glovertown, with a population of about 2,200 is the largest community in the area. In a province with limited employment opportunities, the income and employment created by the operation of the park makes an important contribution to the economic well being of many residents in these communities.

Figure 6-4: Origin of Visitors to Terra Nova National Park



Source: Profile Survey 1991. Terra Nova National Park unpublished, Canadian Parks Service.

In 1989-90, visitor and CPS spent in the province of Newfoundland approximately $11.2 million. Estimated visitor expenditures amounted to $6.9 million in 1989, of which three quarters were made by residents of Newfoundland. CPS spending supported directly 58.3 person-years of employment in the park.

6.3 National Historic Sites

Canadian Parks Service operates five historic sites in the province of Newfoundland, two on the Northern peninsula and three on the Avalon peninsula.

Signal Hill National Historic Site

Signal Hill, located in St. John's, is open year round. The hill relates a rich history of communications, military and medical milestones. The first transatlantic signals sent by wireless were received here. The hill was an important fortification throughout the Napoleonic wars as well as the war of 1812. In the late 1800s, some of the barracks were converted to important hospitals during diphtheria and cholera outbreaks. Visitors enjoy a spectacular view of the Atlantic coastline, as the various walking trails lead to the major points of interest including Queen's battery, Cabot Tower, Powder Magazine and the Soldier canteen.

Visitor Use

Over the past three years attendance at Signal Hill has been in the 300,000-310,000 range. The number of visits made to the site has increased substantially since 1985, when about 250,000 visits were recorded. July and August are the busiest months, although the flow of tourists visiting the site is steady from April through October. Unlike other sites in the region, attendance from November through to February is strong, with about 10,000 visits recorded each month.

Most of those visiting the site are Newfoundland residents. During the peak season, residents of St. John's comprise 60 percent of all visitors and residents from other parts of Newfoundland make up another 10 percent of visitors. Most of the remaining visitors come from other parts of Canada. The typical visitor to Signal Hill stays about a half an hour at the site. Expenditures made by visitors to Signal Hill in the province of Newfoundland in 1989 are estimated at $1.8 million.

The *Signal Hill National Historic Park Visitor Use Analysis, 1984* found that the high resident visitor population has significant implications on the type of facilities and services offered by the park. Facilities such as Visitor Interpretation Centres or similar exhibit centres tend to have an inverse use relationship with repeat visitors. Thus, a St. John's resident may view the exhibit once or twice but the likelihood of an additional viewing declines sharply unless new displays are added. A second implication of the high resident visitor profile is the effect on economic impact of the park. Tourism dollars are generated by an attraction drawing tourists into the region. Expenditures associated with a St. John's resident's trip to Signal Hill would be relatively insignificant.

Cape Spear National Historic Site

Perched at the easternmost point of North America (11 km southeast of St. John's, Newfoundland), Cape Spear is one of the oldest surviving lighthouses in Canada. More than 65 m above sea level, it served as a navigation beacon for mariners from 1836 to 1955. During World War II two gun batteries were constructed at Cape Spear to guard allied shipping against the threat of German submarines. Today, a modern concrete tower has replaced the old lighthouse, but the lighting apparatus, transferred to the new tower in 1955, is still in use. Interpretation at the site focuses on the history of Cape Spear lighthouse and the story of lighthouses in Canada.

Visitor Use

Between 1985 and 1989 attendance at Cape Spear grew by an average annual rate of 12 percent. In the mid 1980s, about 100,000 visits were made to the site. Currently about 155,000 visits are made each year. Expenditures made by visitors of Cape Spear in the province of Newfoundland in 1989 has been estimated at $2.2 million.

Castle Hill National Historic Site

Castle Hill is located in Placentia, 120 km southwest of St. John's, Newfoundland. It was established as a national historic site to commemorate the role of Placentia from 1662 to 1811 in the struggle between France and Britain to protect their fishing interests off Newfoundland. The hill occupies a strategic position overlooking the town and bay of Placentia and contains the excavated and stabilized ruins of defences constructed by French and British in the 17th and 18th centuries.

Fort Royal, the main defensive structure in the town, had massive rubble-filled walls mounted with a wooden gun platform. Its interior includes the remains of a guardroom, barracks, powder magazine and early hearths. A blockhouse dates from when the British garrisoned Placentia between 1713 and 1811. The interpretation centre exhibits recount the town's history since the arrival of the first fishermen in the early 16th century.

Visitor Use

Between 1985 and 1989 attendance at Castle Hill decreased by an average annual rate of about 3 percent a year. This negative growth reflects a significant drop (45 percent) in attendance in 1986. Since 1986 attendance actually grew by 11 percent per year. Currently about 28,000 visits are made to the site each year. Expenditures made by visitors of Castle Hill in the province of Newfoundland in 1989 has been estimated at $490,000.

L'Anse aux Meadows National Historic Site

Located 500 km north of Corner Brook, Newfoundland, L'Anse aux Meadows was declared a Unesco World Heritage Site in 1978. This grassy plain of turf at the northernmost tip of Newfoundland's Great Northern Peninsula is the site of the oldest known European settlement in the New World where archaeologists have discovered the only authenticated remains of a Viking period Norse settlement in North America.

Picnicking and camping facilities are provided at Pistolet Bay, and commercial accommodation is available at St. Anthony, 42 kilometres from the site. The park grounds are open year-round. The visitor reception centre is open from mid-June to Labour Day weekend.

Visitor Use

During the late 1980s, attendance at L'Anse aux Meadows was slightly less than 20,000 visits per year. This is a substantial increase since the mid 1980s when annual attendance was in the 11,000-14,000 range. Expenditures made by visitors of L'Anse aux Meadows in the province of Newfoundland in 1989 has been estimated at $645,000.

Port au Choix National Historic Site

Port au Choix National Historic Site is located 250 kilometres north of Corner Brook, Newfoundland. It was established as a national historic site in 1970 to commemorate one of the most important prehistoric sites in Canada, the discovery of which has contributed much to our knowledge of the Maritime Archaic Indian and the Paleo-Eskimo cultures. The Maritime Archaic Indians inhabited the Newfoundland and Labrador coasts more than 4,000 years ago. The site consists of 3 Maritime Archaic Indian burial sites (2200 to 1200 BC) and 2 Paleo-Eskimc habitation sites (500 BC to 600 AD). It also contains a lighthouse (operated by the federal Ministry of Transport) and keeper's house and outbuildings (administered by Canadian Parks Service).

Visitor Use

Annual attendance at Port Au Choix National Historic Site increased since the mid 1980s. Between 1985 and 1989 attendance grew at an average rate of 14 percent per year. In 1985, about 6,000 visits were recorded. Currently more than 10,000 visits are made to the site each year. Expenditures made by visitors of Port Au Choix in the province of Newfoundland in 1989 has been estimated at $89,000.

Newfoundland's National Historic Sites Regional Context

Three of Newfoundland's Historic Sites are located in the Avalon Peninsula: Signal Hill, Cape Spear and Castle Hill. The other two sites (L'Anse aux Meadows and Port aux Choix) are on the Northern Peninsula. These latter two sites are located in an area lacking a developed tourist infrastructure. A recent study noted that while L'Anse aux Meadows offers many attractive features, there is a lack of support services such as eating and retail establishments in the immediate area. Port au Choix, located between Gros Morne National Park and L'Anse aux Meadows, is in an area with few other developed tourist attractions. The combination of these three CPS facilities play a major role in attracting people to this part of Newfoundland.

The three remaining historic sites are located in the Avalon Peninsula. Both Signal Hill and Cape Spear are in the St. John's area. Castle Hill is located within a two hour drive of the city. These sites provide a sense of historical character to St. John's and is part of the well developed tourist product offered in the city.

The overall budget for Newfoundland national historic sites for 1989-90 amounted to $3,400,000 of which $1,125,000 was paid to park employees in the form of wages and salaries. It accounted for 20 percent of the total Canadian Parks Service budget for parks and sites in the province of Newfoundland. Visitors to Newfoundland's national historic sites spent an estimated $5.3 million in 1989 in the province of Newfoundland.

6.4 Importance of National Parks and Historic Sites as Visitor Attractions

The number of visits made to Newfoundland's national parks and historic sites clearly show they are major tourist attractions in the province and are growing in popularity. In total, about 20 percent more people visited these parks and sites in 1989 than did so in 1985.

Table 6-1
Total Visits to National Parks and Historic Sites in Newfoundland
1985 to 1989

Year	National Parks	Historic Sites	Total
1985	234,392	411,441	645,833
1986	218,278	412,006	630,284
1987	264,735	488,489	753,224
1988	265,861	507,494	773,355
1989	265,855	520,269	786,124

Source: Environment Canada, *Atlantic Region Park Use Statistics 1984-1989.*

Newfoundland's tourism development strategy focuses on two specific objectives: attracting incremental tourism revenues from outside markets and retaining residents' tourism dollars within the province. The province's two national parks and five historic sites have in the past and will continue to play a major role in fulfilling these objectives. Gros Morne attracts a sizeable number of non-resident tourists. The development of the park has enhanced the already popular Viking Trail. The present use of Terra Nova National Park indicates this CPS facility plays an important role in the second element of the tourism strategy and will continue to do so in the future.

6.5 Impacts of Visitor Spending in Newfoundland

In 1989, the two national parks and five historic sites in Newfoundland attracted approximately 785,000 visits. The historic sites accounted for nearly 85 percent of all visits to Newfoundland CPS facilities. In total, these visitors spent approximately $16.0 million on goods and services in the Newfoundland economy. Resident visitors accounted for 65 percent of all expenditures. Although the two parks accounted for only 15 percent of party visits they do account for about 67 percent of party expenditures.

The distribution of visitor expenditures by main industry is set out in Table 6-2. In Newfoundland, expenditures made on commodities in the food and beverage industry was the largest component at about one third of spending. In comparison with the other Atlantic Provinces, the share of expenditure captured by the transportation industry was relatively higher at about 24 percent. This is attributable to the fact Newfoundland is the largest province in Atlantic Canada (in geographic terms) and that major tourist attractions are not located in close proximity to each other. Accommodation services attracted a lower proportion of spending in Newfoundland due to the high number of visitors who stay with friends and relatives.

Table 6-2
Expenditures (1) made by Visitors at National Parks and Historic Sites in Newfoundland by Industry (2) 1989

Industry	Expenditures
Transportation	$3,761,000
Food and Beverage	$5,492,000
Accommodation	$1,716,000
Entertainment	$2,480,000
Other Retail	$2,414,000
Total	**$15,863,000**

(1) Including resident spending.
(2) Revenues collected by CPS from park visitors for such things as entrance fees or campground fees were deducted from overall visitor expenditures. Appendix II indicates the level of revenues collected at each park.

Total impacts from visitors expenditures are estimated to account for $7.2 million of Newfoundland's Gross Domestic Product, as well as $4.2 million worth of labour income and 157 person-years of employment. This represents .1 percent of total Newfoundland GDP for 1989.

Table 6-3
Impacts of Visitor Expenditures on the Newfoundland Economy, 1989

	Direct	Spin-off	Total
National Parks			
Gros Morne			
Employment (P-Ys)	17.4	15.0	32.4
Labour Income	$433,000	$442,000	$875,000
Newfoundland GDP	$775,000	$721,000	$1,496,000
Terra Nova			
Employment (P-Ys)	39.5	34.1	73.6
Labour Income	$990,000	$1,000,000	$1,990,000
Newfoundland GDP	$1,720,000	$1,610,000	$3,330,000
Historic Sites			
Signal Hill			
Employment (P-Ys)	9.5	8.2	17.7
Labour Income	$238,000	$238,000	$476,000
Nfld GDP	$416,000	$388,000	$804,000
Cape Spear			
Employment (P-Ys)	11.7	10.0	21.7
Labour Income	$291,000	$291,000	$582,000
Newfoundland GDP	$509,000	$475,000	$984,000
Castle Hill			
Employment (P-Ys)	2.5	2.2	4.7
Labour Income	$63,000	$63,000	$126,000
Newfoundland GDP	$111,000	$103,000	$214,000
L'Anse aux Meadows			
Employment (P-Ys)	3.4	2.9	6.3
Labour Income	$84,000	$84,000	$168,000
Newfoundland GDP	$147,000	$137,000	$284,000
Port Au Choix			
Employment (P-Ys)	.5	.4	.9
Labour Income	$12,000	$12,000	$24,000
Newfoundland GDP	$20,000	$19,000	$39,000
Total			
Employment (P-Ys)	**84.5**	**72.8**	**157.3**
Labour Income	**$2,111,000**	**$2,130,000**	**$2,251,000**
Newfoundland GDP	**$3,698,000**	**$3,453,000**	**$7,151,000**

6.6 Impacts of CPS Spending on the Newfoundland Economy

In 1989-90, the Canadian Parks Service spent $17.2 million developing and operating national parks and historic sites in Newfoundland[17]. About 57 percent of those expenditures were for purchases of goods and services mainly from capital budgets. This reflects in large measure development work at Gros Morne National Park. Actual CPS employment was the equivalent of 177 person-years.

The economic impacts resulting from the Canadian Parks Service are summarized in Table 6-4. The table shows that total CPS spending resulted in $16.1 million in GDP, most of which (71 percent) was in labour income. As well, CPS supported 336 person-years of employment. Gros Morne National Park accounted for roughly 55 percent of the total impacts.

Comparatively, total GDP impacts of a dollar of CPS expenditure were higher in Newfoundland than in other Atlantic Provinces except Nova Scotia. In part, this is attributable to the relatively high portion of expenditures going to construction work (whose multipliers are quite high). As well, CPS estimates suggest that between 83 percent (Gros Morne), and 94 percent (Terra Nova) of the goods and services were purchased from suppliers in Newfoundland.

6.7 Total Impacts on Newfoundland Economy

In 1989, the economic impacts attributable to the operation and use by visitors, of CPS heritage sites in Newfoundland are shown in Table 6-5. Total expenditures made by both CPS and visitors generated 493 person-years of employment and $15.7 million in labour income.

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[17] From a regional perspective, Newfoundland had a net outflow (estimated at $.4 million) of CPS expenditures. An estimated 6 percent of total CPS spending in the province left the region. The net result of these flows is an upward bias in the economic impact estimates.

Table 6-4
Impacts of CPS Spending at Individual Heritage Locations on the Newfoundland Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
Gros Morne				
Wages and Salaries	$2,900,000	109.0	$3,900,000	$4,800,000
Good and Services	$6,700,000	76.9	$2,450,000	$4,020,000
Total	$9,600,000	185.9	$6,320,000	$8,810,000
Terra Nova				
Wages and Salaries	$2,200,000	75.5	$2,700,000	$3,400,000
Good and Services	$2,000,000	10.8	$400,000	$900,000
Total	$4,300,000	86.2	$3,100,000	$4,300,000
Newfoundland Area NHPS (1)				
Wages and Salaries	$2,300,000	44.8	$1,500,000	$1,900,000
Good and Services	$1,100,000	19.1	$600,000	$1,100,000
Total	$3,400,000	63.9	$2,100,000	$3,000,000
Total National Heritage Locations				
Wages and Salaries	**$7,400,000**	**229.3**	**$8,100,000**	**$10,000,000**
Good and Services	**$9,800,000**	**106.8**	**$3,450,000**	**$6,020,000**
Total	**$17,200,000**	**336.2**	**$11,520,000**	**$16,110,000**

(1) Including District Office.

The input-output model indicates CPS related GDP as $23.3 million. Dividing this by the total Newfoundland GDP indicates that the CPS program accounted for 0.3 percent of provincial GDP in 1989. Another useful ratio is the percent contribution of CPS visitor expenditures to total tourism receipts. In 1989, CPS visitors spent $15.9 million. This represents 4.0 percent of the total tourism receipts spent in the province in that year.

A summary of the overall impacts broken down by the individual parks and the historic sites (combined) for both CPS and visitor expenditures is also shown in Table 6-5. In terms of overall impact, the operation of and visits made to Gros Morne National Park, accounted for 44 percent of the total GDP generated in Newfoundland. Terra Nova accounted for 33 percent and the historic sites the remaining 23 percent. Overall expenditure made by CPS accounted for 69 percent of total economic impact (in terms of GDP) as compared with visitor expenditures which accounted for 31 percent.

Table 6-5
Impacts of CPS and Visitor spending at Newfoundland Heritage Locations on the Newfoundland Economy, 1989-90

Site	Expenditure	Employment (person-years)	Labour Income	GDP
CPS Spending				
Gros Morne	$9,600,000	185.9	$6,300,000	$8,800,000
Terra Nova	$4,300,000	86.2	$3,100,000	$4,300,000
Nfld. Area NHPS (1)	$3,400,000	63.9	$2,100,000	$3,000,000
Sub-total	$17,300,000	336.0	$11,500,000	$16,100,000
Visitor Spending				
Gros Morne	$3,648,000	32.4	$875,000	$1,496,000
Terra Nova	$6,930,000	73.6	$1,990,000	$3,330,000
Nfld. Area NHPS (1)	$5,285,000	51.3	$1,374,000	$2,325,000
Sub-total	$15,863,000	157.3	$4,239,000	$7,151,000
Total	**$33,163,000**	**493.3**	**$15,739,000**	**$23,251,000**

(1) Including District Office.

On a provincial scale, CPS economic impacts appear almost insignificant. However, it must be noted that the relative economic importance of individual heritage sites is far greater on local economies in the immediate vicinity of the parks or sites.

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AN ECONOMIC STATEMENT AND A VISIT PROFILE OF ATLANTIC REGION NATIONAL PARKS AND NATIONAL HISTORIC SITES

TECHNICAL APPENDICES

PREPARED FOR:

ENVIRONMENT CANADA
CANADIAN PARKS SERVICE

PREPARED BY:

GARDNER PINFOLD CONSULTING ECONOMISTS LIMITED

APRIL, 1992

APPENDIX I

METHODOLOGY

APPENDIX I
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METHODOLOGY

CPS and visitor spending is on a variety of goods and services. To provide an accurate assessment of the impacts of these expenditures, therefore, it was necessary to generate weighted average multipliers that would reflect the unique mix of goods and services purchased by both CPS and visitors for each heritage location.

To accomplish this several steps were required:

First, a detailed breakdown of CPS expenditures in each heritage location was obtained. Since CPS expenditures are recorded as Line Objects for accounting purposes, the Line Objects had to be matched with appropriate commodities and primary inputs using commodity groupings from the 602 (large) level of aggregation used by Statistics Canada. Once this was done for each cost centre (i.e., parks, sites or collection of sites), total provincial expenditures by the (602) commodities were generated for introduction to the model.

Second, visitor expenditures were estimated from CPS visitor exit surveys and provincial tourist exit surveys, and park use data on the basis of average length of site use. Expenditures per day per visitor party, generally available from visitor exit surveys were utilized. But to estimate total expenditures, the number of 'expenditure days' had to be known as well. These were derived from data on the number of visitor days and nights based on the number of hours visitors spent at a particular location.

Third, economic multipliers were then estimated using the EcoTec Model. Total impact coefficient were generated for the small level of aggregation. Tables III-1 to III-4, in Appendix III show total impact coefficients in terms of gross production, labour income, person years of employment and GDP all expressed per $1 million dollars of expenditures in each commodity. Unlike the Statistics Canada model, the EcoTec model recognizes Royalties on natural resources and Supplementary labour income as distinct commodities at the small level of aggregation (commodities 50 and 51).

Some of the tables show negative values for total GDP impact coefficients for some commodities. Commodity 45 is mainly unallocated imports, which translate into a negative impact on GDP because they represent Canadian production that leaks out to other countries.

Finally, expenditures by commodity were aggregated, for each site or group of sites, to the small level of aggregation (i.e., 51 commodities) and appropriate weighted multipliers derived.

It should be noted that some of the expenditures recorded as Line Objects consisted of transfer payments. These were excluded from the analysis. Worth noting as well is that, unlike in some earlier studies estimating impacts of CPS spending, construction expenditures made through DPW, and usually recorded as line object 2280, were included in the analysis.

The impact coefficients were generated for the small level. The most comprehensive level of aggregation, the large level used by Statistics Canada has 602 commodities and is cumbersome and ill-suited for presenting summaries of CPS and visitor expenditures for each heritage location. Every small level commodity aggregation contains several 602 commodities and primary inputs, each which have a unique import contents for different provinces. For the impact coefficients at the small level, to accurately reflect import content, rough weights of 602 commodities within each S-level aggregation are desirable. So, the CPS expenditures by Line Objects were first summarized using the large level (602) commodities, then introduced to the model. As well, this provided a guide in generating impact coefficients by the commodity aggregations of the **small** level.

The expenditures, now expressed by the commodities of the large level, were aggregated to the small level for each location and weighted impact coefficients generated for each individual location.

Margins were stripped at the 602 level, when the data was introduced to the model and spread over appropriate margin categories. This study utilized national averages used by Statistics Canada.

One last methodological issue concerns leakages. No data was available at the commodity level of the types of goods and services, and in what proportions were purchased from various provinces. CPS, however, provided rough estimates of how much of each site's or group of sites' budgets ends up in each of the Atlantic Provinces as well as the rest of Canada. Within the region, the leaks tended to minimize each other. The leaks outside the region were estimated at between 5 and 9 percent. The reader is cautioned that these flows overall, introduced an upward bias in the economic impact estimates.

The rest of the technical appendices are laid out as follows:

Appendix I provides an example of Line Objects and matching commodities from the large (L) level of aggregation, then lists 1989/90 CPS expenditures by S-Level commodities, as well as direct employment for each site or group of sites. Appendix II provides estimates of visitor expenditures for each site or group of sites, as well as explanatory notes on how these estimates were derived. A table showing consumer price indices for various commodity groups that were used to convert historical data to 1989 equivalents is also shown. Finally, Appendix III provides tables of the total impact coefficients that were generated using the EcoTec model for each of the four provinces, by the commodities of the S-Level of aggregation.

Table I-1: Line Objects and Matching L-Level Commodities Codes

Line Objects		L Level	Line Objects		L Level	Line Objects		L Level
Code	Title	Code	Code	Title	Code	Code	Title	Code
	Wages & Salaries	599	1735	EDP Equipment	580	2126	Hnd Tool Cutl	297
401	Travel Expenses	585	1736	Off Mch Equip Exc Furn	551	2128	Oth equip Inc X-ray	499
423	Gov't Conferences	585	1737	Other Mch Exc Furn.	551	2129	Photographic Equip	503
444	Travel Training	585	1746	Road Motor Vehicles	551	2135	EDP Equipment	353
601	Transportation Goods Air	536	1801	Marine Const Non Gov't	524	2140	Ships Boats	348
602	Transportation Air	530	1817	Other Ditch Drain Pump	524	2146	Rd Motor Vehicles	341
652	Other Postal Service	545	1836	Brdg Culv Viad Etc	522	2147	Rub Tires Tubes	127
653	Courier Service	545	1901	Elect Consumption	546	2148	Tractors Landscap Equip	343
654	Central Frieght	545	2002	Food Mat Food Prep.	106	2149	Oversnow Vehicles	346
703	Tel. LD Chgs, Non-gov't	544	2004	Fodder Feed	18			
704	Telephone Service Charges	544	2005	Food Parks Field Crew	106			
798	Charges from Other Appr.	**	2006	Topsoil Sand Gravel N G	49			
810	Other Comm Servs	544	2007	Topsoil Sand Grav. OGD	**			
901	Advertising Creative N G	567	2008	Crude Wood Mat	27			
903	Advertising Other N G	567	2010	Crude Anim & Veg Pts	57			
1040	Pub Broch ETC DSS	229	2011	Heating Oil	39			
1043	Pub DSS Other Costs	231	2012	Diesel fuel	395			
1045	Pub.tns DSS Dist Centre	229	2013	Propane Gas LPG	399			
1060	Print Service DSS	229	2014	Automotive Gas	395			
1064	Other	233	2015	Aviation Gas	394			
1070	Print Serv Outside	229	2017	Asphalt	401			
1073	Print Serv Outside Other	231	2018	Oth Petro Coal Pdts	397			
1081	Exposition Serv Outside	231	2020	Wood Fab. Mat	197			
1085	Audio Visual Serv SSC	576	2021	Paper Paper Board	215			
1086	Audio Visul Serv N G	576	2022	Textile Fab. Mat	166			
1088	Graphic Serv Consultants	576	2023	Chemical Rel Pdts	419			
1093	Photographic Serv Photos	573	2025	Plastic Bag Sheet	136			
1105	Legal Services	576	2026	Gunpowder Explos	475			
1141	Arch & Eng Services PWC	576	2027	Chlorin Oxyhen Acetyl	437			
1173	Oth Sci Serv Exc Con.ts	576	2028	Iron Steel Alloys	236			
1183	Res Contracts Park Use	576	2030	Met Fab Basic Prod	325			
1184	Ec Consul Adv Ser & Res	576	2031	Cement	375			
1205	Adult Occup Tr Oth	561	2032	De-Icing Salt	44			
1217	Purch TR Pack Cr	561	2034	Glass	390			
1222	TR PS OTH	561	2035	Insulation Mat	381			
1230	Health Services	563	2037	Exhibits Display Mat	520			
1301	Conct Sten & Typ Serv	599	2039	Uniforms	184			
1501	Laund., Clng & Rel. Ser	568	2040	Protective Clothing	185			
1510	EDP Services	568	2041	Footwear Appr Access	185			
1525	Conct Ad. DSS Serv Chg	566	2042	Toilet Clean Prep ct.	213			
1547	Simult. Interp Services	576	2043	Recreation Equip.	515			
1566	Garbage Collect Exc Munic	576	2044	House Furnishings	204			
1570	Hospitality Exp	576	2045	Kitch Utens Cult Tablew	285			
1575	Membership Fees	576	2048	Stck Item Oth DSS	518			
1576	Corps of Commissionaires	576	2049	Audio & Video Tapes	357			
1577	Other	576	2050	Medic Sup Ophtha Ortho	500			
1580	Purch Grnd Keep Serv	576	2051	Library Stck Paint	228			
1585	Other Personl Services	576	2052	Maps Charts	229			
1586	Oth Serv Cont. Not Spec.	576	2054	Station. Off Supp	226			
1590	Microfilm of Documents	573	2056	Telety Paper Tape	226			
1591	Firefighting Parks	576	2057	Facsimile paper	226			
1594	Interpretation Animation	576	2058	Photo pap chem	211			
1595	Srv NES Exc Gov't Dept.	576	2059	Data process supp	227			
1596	Srv NES Pur Gov't Depts	576	2060	Photograph goods	503			
1597	Miscellaneous Services	576	2062	Firearm weapon ammun	476			
1621	RNT Photo Print Equip	552	2063	Contain CLS return	286			
1622	RNT Off Mach Exc Furn	552	2065	Camera audio-vis	503			
1625	Rent Mach Equip	579	2067	Flags	179			
1630	Passenger Vehichles	577	2068	Paint	494			
1631	Deliv & Const Vehicles	577	2069	Garden supp	510			
1635	Aircraft Ext Suppl.	566	2070	Misc prod audio-vis blb	515			
1640	Rent Buildign Off Admin	559	2071	Hardware	295			
1641	Rent Building Ind Com	559	2112	Cook equip food	358			
1651	Rent Equip. NES	578	2113	Plumd equip fit	317			
1712	Cook Equip. Food	551	2114	Elec light Dist equip	361			
1715	Electronic Equip.	551	2116	Oth Elec Appl Equip	368			
1719	Sa San Alarm Sign Syst.	580	2117	Gen Elec Equip	362			
1722	Furniture & Fixtures	551	2118	Batteries	369			
1725	Camera Audio-Vis Equip.	551	2120	Other Lab Sypp	498			
1728	Other Equip.	580	2124	Saf Sanit Equip	500			
1734	Telecom Equip.	358	2125	Serv Ind Equip	318			

Notes: ** Transfers

CPS provided an initial listing of matching commodity codes (for some line objects) at the medium level of aggregation used by Statistics Canada. This served as a rough guide to finding matching commodities using the large (602) level of aggregation. One notable deviation from suggested treatment of the line objects is the inclusion of construction work done by DPW for CPS. Previous CPS analysis had excluded this line object in the determination of impacts. It was felt that since this capital projects represented major outlays in some sites, they should be included.

Table I-2 Kejimkujik National Park
1989 CPS Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital amount	O&M amount	Total amount
3	Forestry pdts	0	8,300	8,300
6	Minerals fuels	0	8,400	8,400
7	Non-metallic minerals	0	3,500	3,500
9	Meat, fish & dairy pdts	400	100	500
10	Fruit, veg. feed misc fab.	0	4,400	4,400
13	Rubber, leather plastic	0	3,900	3,900
14	Textile pdts	0	400	400
15	Knitted pdts & clothing	5,800	6,200	11,900
16	Lumber, sawmill, other w. pdts	40,900	8,100	49,000
17	Furniture & fixtures	3,600	100	3,700
18	Paper & paper pdts	10,200	8,700	18,900
19	Printing & publishing	7,600	36,700	44,300
20	Primary metal pdts	200	1,900	2,100
21	Metal fabricated pdts	11,200	6,000	17,200
22	Machinery & equipment	10,800	8,800	19,600
23	Autos, trucks, other tranp. equip	100,200	12,100	112,300
24	Elec. & communic. pdts	35,200	11,600	46,800
25	Non-metallic mineral pdts	0	1,600	1,600
26	Petroleum & coal pdts	0	37,200	37,200
27	Chemical & chemical pdts	3,300	14,200	17,600
28	Misc manufactured goods	30,300	15,900	46,200
30	Non-residential construction	9,900	1,600	11,600
31	Repair construction	31,600	500	32,100
32	Transportation & storage	700	1,700	2,300
33	Communication services	11,300	30,600	41,900
34	Other utilities	0	30,300	30,300
38	Other finance, ins., real estate	0	100	100
39	Business services	94,300	68,200	162,500
40	Personal & other misc services	36,200	21,300	57,500
42	Operating. office, lab. & food	0	1,300	1,300
43	Travel, advertising, promotion	4,200	35,600	39,700
	Sub-Total (G&S)	447,900	389,300	837,100
47	Labour income	12,600	1,359,600	1,372,200
	Total	460,500	1,748,900	2,209,300

Note (1): Excluding transfers. (Figures are rounded independently.)

Table I-3: Kejimkujik National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	447,900	389,300	837,200
Wages and Salaries	12,600	1,359,600	1,372,200
Total	460,500	1,748,900	2,209,400

Weighted Multipliers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Wages and Salaries
Employment (1)	7.5	8.4	10.4
Labour Income	0.20	0.23	1.31
GDP	0.31	0.41	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Wages and Salaries (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	3.4	3.3	6.6	0.3	51.0	51.4	58.0
Wages and Salaries	90,000	90,000	180,000	20,000	1,780,000	1,800,000	1,980,000
GDP	140,000	160,000	300,000	20,000	2,230,000	2,250,000	2,550,000

Note (1): **Person-years per $1 million in expenditures.**

Note (2): **Actual employment (in P-Ys); 36.9 in O&M, .2 in Capital.**

Table I-4: Cape Breton Highlands National Park
1989/90 CPS Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital	O&M	Total
2	Other agric pdts	0	0	0
3	Forestry pdts	0	7,400	7,400
5	Metallic ores & concent.	4,300	0	4,300
6	Minerals fuels	0	20,300	20,300
7	Non-metallic minerals	8,800	105,600	114,400
9	Meat, fish & dairy pdts	0	0	0
10	Fruit, veg. feed misc fab.	0	1,000	1,000
13	Rubber, leather plastic	200	12,300	12,500
14	Textile pdts	100	3,200	3,300
15	Knitted pdts & clothing	14,900	12,000	26,900
16	Lumber, sawmill, other w. pdts	42,700	47,300	90,000
17	Furniture & fixtures	2,700	600	3,200
18	Paper & paper pdts	0	44,500	44,500
19	Printing & publishing	5,100	18,600	23,700
20	Primary metal pdts	18,600	400	19,000
21	Metal fabricated pdts	7,400	30,500	37,900
22	Machinery & equipment	88,300	7,500	95,800
23	Autos, trucks, other tranp. equip	173,100	101,200	274,200
24	Elec. & communic. pdts	52,100	29,900	81,900
25	Non-metallic mineral pdts	2,700	4,300	7,000
26	Petroleum & coal pdts	100	107,200	107,300
27	Chemical & chemical pdts	1,200	27,200	28,400
28	Misc manufactured goods	55,300	38,400	93,700
30	Non-residential construction	137,900	900	138,800
31	Repair construction	0	1,000	1,000
32	Transportation & storage	1,000	1,000	2,000
33	Communication services	0	56,800	56,800
34	Other utilities	0	72,400	72,400
38	Other finance, ins., real estate	0	200	200
39	Business services	88,300	275,400	363,700
40	Personal & other misc services	3,324,500	63,800	3,388,300
42	Operating. office, lab. & food	0	3,900	3,900
43	Travel, advertising, promotion	19,200	52,300	71,500
	Sub-Total (G&S)	4,048,300	1,147,100	5,195,400
47	Labour income	29,300	3,094,500	3,123,800
	Total	4,077,600	4,241,600	8,319,200

Note (1): Excluding transfers. (Figures are rounded independently.)

Table I-5: Cape Breton Highlands National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	4,048,300	1,147,100	5,195,400
Labour Income	29,300	3,094,500	3,123,800
Total	4,077,600	4,241,600	8,319,200

Weighted Multipliers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	23.4	7.3	10.4
Labour Income	0.55	0.20	1.31
GDP	0.85	0.34	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	94.7	8.3	103.0	1.9	125.3	127.2	230.2
Labour Income	2,210,000	230,000	2,440,000	40,000	4,050,000	4,090,000	6,530,000
GDP	3,450,000	390,000	3,840,000	50,000	5,070,000	5,120,000	8,960,000

Note (1): Person-years per $1 million in expenditures.

Note (2): Actual employment (in P-Ys); 93.1 in O&M, 1.7 in Capital.

Table I-6: Alexander G. Bell National Historic Site
1989/90 CPS Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital	O&M	Total
6	Minerals fuels	200	1,200	1,300
7	Non-metallic minerals	0	2,100	2,100
13	Rubber, leather plastic	0	0	0
14	Textile pdts	500	0	500
15	Knitted pdts & clothing	400	1,400	1,800
16	Lumber, sawmill, other w. pdts	500	2,900	3,400
17	Furniture & fixtures	600	0	600
18	Paper & paper pdts	23,300	5,800	29,100
19	Printing & publishing	19,300	20,100	39,400
20	Primary metal pdts	600	0	600
21	Metal fabricated pdts	1,600	2,200	3,800
22	Machinery & equipment	13,200	1,000	14,200
23	Autos, trucks, other tranp. equip	18,100	400	18,400
24	Elec. & communic. pdts	4,200	600	4,800
25	Non-metallic mineral pdts	1,000	100	1,200
26	Petroleum & coal pdts	0	3,400	3,400
27	Chemical & chemical pdts	0	300	300
28	Misc manufactured goods	9,400	8,500	17,900
30	Non-residential construction	73,900	0	73,900
31	Repair construction	526,400	900	527,300
32	Transportation & storage	1,100	100	1,200
33	Communication services	1,900	19,400	21,300
34	Other utilities	5,200	57,500	62,700
38	Other finance, ins., real estate	200	0	200
39	Business services	4,100	79,200	83,400
40	Personal & other misc services	230,000	143,900	373,900
42	Operating. office, lab. & food	70,000	1,400	71,400
43	Travel, advertising, promotion	32,100	10,500	42,700
	Sub-Total (G&S)	1,037,900	362,700	1,400,700
47	Labour income	0	280,100	280,100
	Total	1,037,900	642,900	1,680,800

Note (1): Excluding transfers. (Figures are rounded independently.)

Table I-7: Alexander G. Bell National Historic Site
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	1,037,900	362,700	1,400,600
Labour Income	0	280,100	280,100
Total	1,037,900	642,800	1,680,700

Weighted Multiplers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	16.9	15.8	10.4
Labour Income	0.46	0.40	1.31
GDP	0.74	0.67	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	17.5	5.7	23.2	0.0	11.1	11.1	34.4
Labour Income	480,000	140,000	620,000	0	370,000	370,000	990,000
GDP	770,000	240,000	1,010,000	0	460,000	460,000	1,470,000

Note (1): **Person-years per $1 million in expenditures.**

Note (2): **Actual employment (in P-Ys); 8.2 in O&M.**

Table I-8: The Fortress of Louisbourg National Historic Site
1989/90 CPS Expenditures (1) By Commodity

S-level Code	Commodity Description	Capital	O&M	Total
5	Metallic ores & concent.	0	5,000	5,000
6	Minerals fuels	64,700	71,100	135,900
7	Non-metallic minerals	10,200	14,000	24,200
9	Meat, fish & dairy pdts	0	0	0
10	Fruit, veg. feed misc fab.	0	4,300	4,300
13	Rubber, leather plastic	0	3,600	3,600
14	Textile pdts	3,400	200	3,600
15	Knitted pdts & clothing	11,000	21,100	32,000
16	Lumber, sawmill, other w. pdts	0	33,900	33,900
17	Furniture & fixtures	7,600	5,100	12,700
18	Paper & paper pdts	5,500	44,300	49,900
19	Printing & publishing	33,500	52,900	86,300
20	Primary metal pdts	1,100	1,000	2,100
21	Metal fabricated pdts	5,200	24,800	29,900
22	Machinery & equipment	62,300	56,100	118,400
23	Autos, trucks, other tranp. equip	60,800	20,900	81,700
24	Elec. & communic. pdts	30,500	50,500	80,900
25	Non-metallic mineral pdts	7,700	7,100	14,800
26	Petroleum & coal pdts	100	39,000	39,100
27	Chemical & chemical pdts	3,900	46,200	50,100
28	Misc manufactured goods	138,600	31,600	170,200
30	Non-residential construction	17,800	6,200	24,000
31	Repair construction	23,600	28,400	51,900
32	Transportation & storage	6,700	1,300	8,000
33	Communication services	1,600	73,200	74,800
34	Other utilities	100	94,000	94,100
38	Other finance, ins., real estate	1,300	300	1,600
39	Business services	145,300	456,700	602,000
40	Personal & other misc services	325,700	102,700	428,400
42	Operating. office, lab. & food	800	7,400	8,100
43	Travel, advertising, promotion	35,500	61,100	96,600
	Sub-Total (G&S)	1,004,400	1,363,900	2,368,300
47	Labour income	312,900	4,816,800	5,129,600
	Total	1,317,200	6,180,700	7,497,900

Note (1): Excluding transfers. (Figures have been rounded independently.)

Table I-9: The Fortress of Louisbourg National Historic Site
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	1,000,000	1,360,000	2,360,000
Labour Income	310,000	4,820,000	5,130,000
Total	1,310,000	6,180,000	7,490,000

Weighted Multipliers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	11.9	8.6	10.4
Labour Income	0.28	0.23	1.31
GDP	0.45	0.38	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	11.9	11.7	23.6	10.5	178.7	189.2	212.8
Labour Income	280,000	310,000	590,000	410,000	6,310,000	6,720,000	7,310,000
GDP	450,000	520,000	970,000	510,000	7,900,000	8,410,000	9,380,000

Note (1): **Person-years per $1 million in expenditures.**

Note (2): **Actual employment (in P-Ys);128.6 in O&M, 7.8 in Capital.**

Table I-10: Halifax Defence Complex National Historic Site 1989/90 CPS Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital	O&M	Total
3	Forestry pdts	3,400	0	3,400
5	Metallic ores & concent.	0	0	0
6	Minerals fuels	3,000	23,000	26,000
7	Non-metallic minerals	300	3,700	3,900
9	Meat, fish & dairy pdts	0	100	100
10	Fruit, veg. feed misc fab.	0	0	0
13	Rubber, leather plastic	300	1,100	1,400
14	Textile pdts	1,500	2,700	4,200
15	Knitted pdts & clothing	2,500	1,900	4,400
16	Lumber, sawmill, other w. pdts	1,400	4,800	6,200
17	Furniture & fixtures	0	400	400
18	Paper & paper pdts	1,800	4,900	6,700
19	Printing & publishing	2,100	26,100	28,200
20	Primary metal pdts	1,300	900	2,200
21	Metal fabricated pdts	28,400	8,100	36,500
22	Machinery & equipment	400	1,100	1,500
23	Autos, trucks, other tranp. equip	0	400	400
24	Elec. & communic. pdts	2,600	2,700	5,300
25	Non-metallic mineral pdts	100	3,100	3,100
26	Petroleum & coal pdts	3,100	7,300	10,400
27	Chemical & chemical pdts	1,500	14,200	15,700
28	Misc manufactured goods	32,500	34,000	66,500
30	Non-residential construction	122,800	1,200	124,100
31	Repair construction	700	0	700
32	Transportation & storage	1,300	1,200	2,500
33	Communication services	500	26,100	26,700
34	Other utilities	0	72,000	72,000
38	Other finance, ins., real estate	0	400	400
39	Business services	580,500	0	580,500
40	Personal & other misc services	88,800	637,600	726,400
42	Operating. office, lab. & food	0	200	200
43	Travel, advertising, promotion	14,900	55,000	70,000
	Sub-Total (G&S)	895,900	934,100	1,830,000
47	Labour income	3,400	1,315,800	1,319,200
	Total	899,300	2,249,900	3,149,200

Notes (1): Excluding transfers. (Figures are rounded independently.)

Table I-11: Halifax Defence Complex National Historic Site
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	900,000	930,000	1,830,000
Labour Income	3,400	1,320,000	1,320,000
Total	900,000	2,250,000	3,150,000

Weighted Multipliers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Labour Income
Employment (1)	11.1	20.7	10.4
Labour Income	0.28	0.49	1.31
GDP	0.43	0.80	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	10.0	19.3	29.3	0.1	54.0	54.1	83.4
Labour Income	251,065	463,495	714,559	0	1,730,000	1,730,000	2,444,559
GDP	386,140	747,089	1,133,229	10,000	2,160,000	2,170,000	3,303,229

Note (1): Person-years per $1 million in expenditures.

Note (2): Actual employment (in P-Ys); 40.3 in O&M.

Table I-12: South West Nova Scotia National Historic Parks and Sites
1989/90 CPS Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital	O&M	Total
2	Other agric pdts	0	100	100
3	Forestry pdts	0	400	400
6	Minerals fuels	0	5,800	5,800
7	Non-metallic minerals	100	600	700
9	Meat, fish & dairy pdts	0	400	400
10	Fruit, veg. feed misc fab.	300	0	300
13	Rubber, leather plastic	0	100	100
14	Textile pdts	1,400	2,200	3,600
15	Knitted pdts & clothing	600	1,300	1,900
16	Lumber, sawmill, other w. pdts	3,500	1,700	5,100
17	Furniture & fixtures	2,300	700	3,000
18	Paper & paper pdts	3,800	7,000	10,700
19	Printing & publishing	4,700	15,500	20,200
20	Primary metal pdts	0	200	200
21	Metal fabricated pdts	300	4,300	4,700
22	Machinery & equipment	10,800	1,900	12,700
23	Autos, trucks, other tranp. equip	14,100	1,900	16,000
24	Elec. & communic. pdts	2,300	3,100	5,300
25	Non-metallic mineral pdts	1,000	300	1,300
26	Petroleum & coal pdts	200	9,100	9,300
27	Chemical & chemical pdts	0	3,600	3,600
28	Misc manufactured goods	32,800	6,900	39,700
30	Non-residential construction	2,300	100	2,300
31	Repair construction	0	300	300
32	Transportation & storage	0	600	600
33	Communication services	700	18,300	19,000
34	Other utilities	0	6,600	6,600
39	Business services	110,200	83,800	194,000
40	Personal & other misc services	10,800	9,000	19,800
42	Operating. office, lab. & food	0	300	300
43	Travel, advertising, promotion	4,800	18,000	22,800
	Sub-Total (G&S)	206,800	203,700	410,600
47	Labour income	0	723,200	723,200
	Total	206,800	927,000	1,133,800

Note (1): Excluding transfers. (Figures are rounded independently.)

Table I-13: South West Nova Scotia National Historic Parks and Sites
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	210,000	200,000	410,000
Labour Income	0	720,000	720,000
Total	210,000	920,000	1,130,000

Weighted Multipliers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Labour Income
Employment (1)	7.4	9.0	10.4
Labour Income	0.18	0.24	1.31
GDP	0.27	0.39	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	1.5	1.8	3.4	0.0	29.3	29.3	32.6
Labour Income	40,000	50,000	90,000	0	940,000	940,000	1,030,000
GDP	60,000	80,000	140,000	0	1,180,000	1,180,000	1,320,000

Note (1): Person-years per $1 million in expenditures.

Note (2): Direct employment (in P-Ys); 21.8 in O&M.

Table I-14: Atlantic Regional Office
1989/90 Expenditures (1) by Commodity

S-level Code	Commodity Description	Capital	O&M	Total
3	Forestry pdts	0	0	0
5	Metallic ores & concent.	200	0	200
9	Meat, fish & dairy pdts	0	100	100
10	Fruit, veg. feed misc fab.	0	700	700
13	Rubber, leather plastic	27,700	200	27,900
14	Textile pdts	200	300	500
15	Knitted pdts & clothing	100	200	300
16	Lumber, sawmill, other w. pdts	0	200	200
17	Furniture & fixtures	32,500	6,800	39,300
18	Paper & paper pdts	287,500	47,100	334,600
19	Printing & publishing	33,800	39,800	73,600
21	Metal fabricated pdts	1,900	1,200	3,200
22	Machinery & equipment	7,800	1,000	8,800
23	Autos, trucks, other tranp. equip	0	1,100	1,100
24	Elec. & communic. pdts	109,900	10,600	120,500
25	Non-metallic mineral pdts	200	100	300
26	Petroleum & coal pdts	700	800	1,600
27	Chemical & chemical pdts	700	1,300	2,000
28	Misc manufactured goods	212,500	116,100	328,600
30	Non-residential construction	22,400	6,900	29,300
31	Repair construction	3,300	32,700	36,000
32	Transportation & storage	2,000	209,100	211,100
33	Communication services	5,000	285,800	290,900
38	Other finance, ins., real estate	600	16,700	17,200
39	Business services	1,916,800	1,601,200	3,518,000
40	Personal & other misc services	147,700	49,500	197,100
42	Operating. office, lab. & food	20,000	119,500	139,500
43	Travel, advertising, promotion	155,300	497,800	653,100
	Sub-Total (G&S)	2,988,900	3,046,500	6,035,400
47	Labour income	305,700	5,918,300	6,224,000
	Total	3,294,700	8,964,800	12,259,500

Notes: 1. Excluding transfers. (Figures are rounded independently)

Table I-15: Atlantic Regional Office
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	2,990,000	3,050,000	6,040,000
Labour Income	305,700	5,920,000	6,230,000
Total	3,300,000	8,970,000	12,270,000

Weighted Multiplers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Labour Income
Employment (1)	8.3	10.1	10.4
Labour Income	0.20	0.27	1.31
GDP	0.30	0.42	1.64

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	24.7	30.8	55.5	10.3	201.4	211.7	267.1
Labour Income	590,000	820,000	1,410,000	400,000	7,760,000	8,160,000	9,570,000
GDP	890,000	1,280,000	2,170,000	500,000	9,710,000	10,210,000	12,380,000

Notes:
1. Person-years per $ 1 million in expenditures
2. Direct employment (in P-Ys); 139.8 in O&M, 7.2 in Capital.

Table I-16: PEI District 1989/90 CPS Expenditures by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
6	Minerals fuels	0	70,900	70,900
7	Non-metallic minerals	10,000	7,600	17,500
9	Meat, fish & dairy pdts	0	0	0
10	Fruit, veg. feed misc fab.	100	900	900
13	Rubber, leather plastic	3,600	3,600	7,300
14	Textile pdts	4,900	1,800	6,800
15	Knitted pdts & clothing	4,900	11,700	16,500
16	Lumber, sawmill, other w.	64,800	16,600	81,400
17	Furniture & fixtures	35,200	300	35,500
18	Paper & paper pdts	500	43,900	44,400
19	Printing & publishing	186,500	15,000	201,500
20	Primary metal pdts	22,500	3,100	25,700
21	Metal fabricated pdts	16,500	5,000	21,500
22	Machinery & equipment	148,600	18,600	167,300
23	Autos, trucks, other tranp.	135,100	16,900	152,000
24	Elec. & communic. pdts	78,600	27,300	105,800
25	Non-metallic mineral pdts	4,900	4,800	9,700
26	Petroleum & coal pdts	1,300	59,600	60,900
27	Chemical & chemical pdts	4,500	17,000	21,500
28	Misc manufactured goods	86,800	22,800	109,600
30	Non-residential constructic	864,300	0	864,300
31	Repair construction	0	1,800	1,800
32	Transportation & storage	3,500	1,300	4,800
33	Communication services	15,400	50,800	66,100
34	Other utilities	0	71,700	71,700
38	Other finance, ins., real est	1,000	700	1,700
39	Business services	415,400	421,100	836,500
40	Personal & other misc serv	49,200	263,500	312,600
42	Operating. office, lab. & fc	3,100	1,500	4,600
43	Travel, advertising, promoı	56,600	61,100	117,700
	Sub-Total (G&S)	2,217,600	1,220,800	3,438,500
47	Labour income	11,200	2,879,000	2,890,200
	Total	2,228,900	4,099,800	6,328,700

Notes: 1. Excluding transfers. (Figures are rounded independently)

Table I-17: PEI District
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	2,220,000	1,220,000	3,440,000
Labour Income	11,200	2,880,000	2,890,000
Total	2,230,000	4,100,000	6,330,000

Weighted Multiplers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	9.4	9.3	9.8
Labour Income	0.24	0.22	1.26
GDP	0.38	0.36	1.56

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	20.9	11.4	32.3	0.3	112.0	112.3	144.7
Labour Income	520,000	260,000	780,000	10,000	3,630,000	3,640,000	4,420,000
GDP	840,000	440,000	1,280,000	20,000	4,490,000	4,510,000	5,790,000

Notes: 1. Person-years per $ 1 million in expenditures
2. Actual employment (in P-Ys): 83.8 in O&M, .21 in Capital.

Table I-18: Gros Morne National Park 1989/90 Expenditures (1) by Commodity

S-Level Code	Commodity Descriptions	Capital	O&M	Total
3	Forestry pdts	200	9,500	9,600
6	Minerals fuels	100	15,200	15,300
9	Meat, fish & dairy pdts	0	1,000	1,000
10	Fruit, veg. feed misc fab.	700	1,800	2,500
13	Rubber, leather plastic	1,800	6,100	8,000
14	Textile pdts	1,400	900	2,300
15	Knitted pdts & clothing	13,600	12,800	26,300
16	Lumber, sawmill, other w. pdts	40,500	8,800	49,300
17	Furniture & fixtures	6,000	4,000	10,000
18	Paper & paper pdts	4,200	21,100	25,300
19	Printing & publishing	162,700	17,000	179,600
20	Primary metal pdts	5,800	1,100	6,900
21	Metal fabricated pdts	40,500	21,400	61,800
22	Machinery & equipment	22,800	13,200	36,000
23	Autos, trucks, other tranp. equip	170,400	700	171,100
24	Elec. & communic. pdts	32,500	21,800	54,300
25	Non-metallic mineral pdts	8,200	800	9,000
26	Petroleum & coal pdts	14,800	65,300	80,100
27	Chemical & chemical pdts	1,800	47,500	49,300
28	Misc manufactured goods	127,300	40,400	167,700
30	Non-residential construction	4,020,700	747,600	4,768,300
31	Repair construction	31,200	1,700	32,900
32	Transportation & storage	3,800	700	4,500
33	Communication services	15,900	50,100	66,000
34	Other utilities	2,500	31,800	34,400
38	Other finance, ins., real estate	0	0	0
39	Business services	399,300	61,100	460,300
40	Personal & other misc services	82,700	118,700	201,500
42	Operating. office, lab. & food	1,500	2,000	3,500
43	Travel, advertising, promotion	116,200	70,500	186,800
	Sub-Total (G&S)	5,329,200	1,394,400	6,723,600
47	Labour income	762,100	2,106,800	2,868,900
	Total	6,091,300	3,501,200	9,592,500

Notes 1. Excluding tranfers.

Table I-19 Gros Morne National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures
($)

	Capital	O&M	Total
Goods & Services	5,329,200	1,394,400	6,723,600
Labour Income	762,100	2,106,800	2,868,900
Total	6,091,300	3,501,200	9,592,500

Weighted Multipliers

Type of	Goods & Services		Labour
Impact	Capital	O&M	Income
Employment (1)	11.55	10.984	8.7
Labour Income	.370	0.347	1.35
GDP	0.605	0.575	1.67

Impacts

Type of	From Purchases of Goods & Services			From Labour Income (2)			Grand
Impact	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	Total
Employment (P-Y)	61.6	15.3	76.9	29.9	79.0	109.0	185.9
Labour Income ($)	1,970,000	480,000	2,450,000	1,030,000	2,840,000	3,870,000	6,320,000
GDP ($)	3,220,000	800,000	4,020,000	1,270,000	3,520,000	4,790,000	8,810,000

Notes: 1. Person-years per $1 million in expenditures.
2. Actual employment (in P-Ys); 60.7 in O&M, 23.3 in Capital.

Table I-20: Terra Nova National Park
1989/90 CPS Expenditures (1) by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
5	Metallic ores & concent.	0	700	700
6	Minerals fuels	0	31,500	31,500
7	Non-metallic minerals	0	113,500	113,500
9	Meat, fish & dairy pdts	0	0	0
10	Fruit, veg. feed misc fab.	0	2,400	2,400
13	Rubber, leather plastic	300	10,300	10,600
14	Textile pdts	0	1,100	1,100
15	Knitted pdts & clothing	7,700	14,300	22,000
16	Lumber, sawmill, other w. pdts	51,900	8,300	60,200
17	Furniture & fixtures	16,100	800	16,900
18	Paper & paper pdts	2,100	31,000	33,100
19	Printing & publishing	6,900	16,800	23,700
20	Primary metal pdts	1,200	700	1,900
21	Metal fabricated pdts	17,800	13,900	31,600
22	Machinery & equipment	15,500	22,300	37,800
23	Autos, trucks, other tranp. equip	213,100	54,300	267,400
24	Elec. & communic. pdts	71,100	20,300	91,400
25	Non-metallic mineral pdts	1,500	1,900	3,500
26	Petroleum & coal pdts	2,300	55,100	57,300
27	Chemical & chemical pdts	1,400	44,500	46,000
28	Misc manufactured goods	64,700	28,100	92,800
30	Non-residential construction	95,900	0	95,900
31	Repair construction	400	3,100	3,500
32	Transportation & storage	500	8,900	9,400
33	Communication services	8,100	40,500	48,600
34	Other utilities	523,200	41,800	565,000
39	Business services	78,600	363,600	442,100
40	Personal & other misc services	14,600	26,000	40,600
42	Operating. office, lab. & food	7,300	3,300	10,500
43	Travel, advertising, promotion	18,400	56,500	74,900
	Sub-Total (G&S)	1,220,600	1,015,500	2,235,900
47	Labour income	98,800	1,923,000	2,021,800
	Total	1,319,400	2,938,500	4,257,700

1. Excluding transfers.

Table I-21: Terra Nova National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	1,220,000	1,020,000	2,240,000
Labour Income	98,800	1,920,000	2,020,000
Total	1,320,000	2,940,000	4,260,000

Weighted Multiplers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Labour Income
Employment (1)	4.9	4.7	8.7
Labour Income	0.18	0.15	1.35
GDP	0.54	0.26	1.67

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	6.0	4.8	10.8	4.2	71.3	75.5	86.2
Labour Income	220,000	160,000	380,000	130,000	2,590,000	2,720,000	3,100,000
GDP	660,000	270,000	930,000	160,000	3,210,000	3,370,000	4,300,000

Notes:
1. Person-years per $ 1 million in expenditures.
2. Direct employment (in P-Ys); 54.6 in O&M, 3.7 in Capital.

Table I-22: Newfoundland Area NHPS
1989/90 CPS Expenditures (1) by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
3	Forestry pdts	4,600	2,400	7,000
5	Metallic ores & concent.	100	400	500
6	Minerals fuels	0	13,100	13,100
7	Non-metallic minerals	4,800	4,300	9,100
9	Meat, fish & dairy pdts	15,000	100	15,100
10	Fruit, veg. feed misc fab.	0	800	800
13	Rubber, leather plastic	2,500	3,100	5,600
14	Textile pdts	55,700	1,200	56,900
15	Knitted pdts & clothing	39,300	6,000	45,300
16	Lumber, sawmill, other w. pdts	124,500	4,300	128,800
17	Furniture & fixtures	28,200	600	28,900
18	Paper & paper pdts	3,400	12,900	16,300
19	Printing & publishing	17,300	13,300	30,600
20	Primary metal pdts	1,100	1,200	2,300
21	Metal fabricated pdts	13,900	7,300	21,200
22	Machinery & equipment	6,000	1,700	7,700
23	Autos, trucks, other tranp. equip	80,800	1,100	81,900
24	Elec. & communic. pdts	13,300	2,000	15,300
25	Non-metallic mineral pdts	1,000	2,900	3,900
26	Petroleum & coal pdts	2,600	34,700	37,300
27	Chemical & chemical pdts	2,300	16,900	19,200
28	Misc manufactured goods	23,400	22,500	45,900
30	Non-residential construction	650,000	12,500	662,400
31	Repair construction	54,500	5,100	59,700
32	Transportation & storage	900	2,000	2,900
33	Communication services	1,500	36,000	37,500
34	Other utilities	117,000	60,000	177,000
38	Other finance, ins., real estate	0	3,300	3,300
39	Business services	255,400	242,100	497,500
40	Personal & other misc services	30,000	50,600	80,600
42	Operating. office, lab. & food	7,200	11,800	19,000
43	Travel, advertising, promotion	66,400	53,200	119,600
	Sub-Total (G&S)	1,622,700	629,400	2,252,200
47	Labour income	19,500	1,106,400	1,125,900
	Total	1,642,200	1,735,800	3,378,100

1. Excluding transfers.

Table I-23: Newfoundland Area NHPS
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	1,620,000	630,000	2,250,000
Labour Income	19,500	1,110,000	1,130,000
Total	1,640,000	1,740,000	3,380,000

Weighted Multiplers

Type of Impact	Goods and Services Capital	Goods and Services O&M	Labour Income
Employment (1)	9.0	7.2	8.7
Labour Income	0.29	0.23	1.35
GDP	0.51	0.41	1.67

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	14.6	4.5	19.1	0.9	43.9	44.8	63.9
Labour Income	460,000	140,000	600,000	30,000	1,500,000	1,530,000	2,130,000
GDP	820,000	260,000	1,080,000	30,000	1,850,000	1,880,000	2,960,000

Notes: 1. Person-years per $ 1 million in expenditures.

2. Direct employment (in P-Ys); 34.5 in O&M, .8 in Capital.

Table I-24: Kouchibouguac National Park
1989/90 CPS Expenditures by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
5	Metallic ores & concent.	0	12,600	12,600
6	Minerals fuels	6,600	7,400	14,000
7	Non-metallic minerals	73,300	1,600	75,000
9	Meat, fish & dairy pdts	5,600	0	5,600
10	Fruit, veg. feed misc fab.	0	2,000	2,000
13	Rubber, leather plastic	700	3,900	4,600
14	Textile pdts	0	700	700
15	Knitted pdts & clothing	7,200	10,600	17,800
16	Lumber, sawmill, other w. pdts	7,200	4,500	11,700
17	Furniture & fixtures	10,000	700	10,800
18	Paper & paper pdts	6,000	11,800	17,800
19	Printing & publishing	4,100	11,900	16,000
20	Primary metal pdts	0	400	400
21	Metal fabricated pdts	5,500	3,100	8,600
22	Machinery & equipment	5,700	1,800	7,600
23	Autos, trucks, other tranp. equi	45,300	1,300	46,600
24	Elec. & communic. pdts	18,200	6,200	24,400
25	Non-metallic mineral pdts	0	200	200
26	Petroleum & coal pdts	400	40,800	41,200
27	Chemical & chemical pdts	1,500	2,500	4,100
28	Misc manufactured goods	216,800	172,500	389,300
30	Non-residential construction	78,100	0	78,100
31	Repair construction	0	119,000	119,000
32	Transportation & storage	300	1,700	2,100
33	Communication services	3,400	38,600	42,000
34	Other utilities	1,462,000	53,100	1,515,100
38	Other finance, ins., real estate	100	700	700
39	Business services	42,200	247,100	289,300
40	Personal & other misc services	156,400	191,800	348,200
42	Operating. office, lab. & food	0	8,300	8,300
43	Travel, advertising, promotion	20,100	42,300	62,400
	Sub-Total (G&S)	2,176,700	999,100	3,176,200
47	Labour income	536,200	1,451,600	1,987,700
	Total	2,712,900	2,450,700	5,163,900

Table I-25: Kouchibouguac National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	2,180,000	1,000,000	3,180,000
Labour Income	536,200	1,450,000	1,990,000
Total	2,720,000	2,450,000	5,170,000

Weighted Multiplers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	4.7	9.4	9.3
Labour Income	0.16	0.25	1.27
GDP	0.49	0.42	1.58

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	10.3	9.4	19.7	23.6	52.6	76.2	95.9
Labour Income	340,000	250,000	590,000	680,000	1,840,000	2,520,000	3,110,000
GDP	1,060,000	420,000	1,480,000	850,000	2,290,000	3,140,000	4,620,000

Notes: 1. Person-years per $ 1 million in expenditures.
2. Direct employment in person years; 39.15 in O&M, and 18.54 in Capital.

Table I-26: Fundy National Park
1989/90 CPS Expenditures by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
6	Minerals fuels	0	22,800	22,800
7	Non-metallic minerals	1,800	15,900	17,700
9	Meat, fish & dairy pdts	700	0	700
10	Fruit, veg. feed misc fab.	0	400	400
13	Rubber, leather plastic	400	12,400	12,800
14	Textile pdts	500	100	600
15	Knitted pdts & clothing	4,600	10,100	14,700
16	Lumber, sawmill, other w. pdts	89,300	4,900	94,200
17	Furniture & fixtures	2,200	0	2,200
18	Paper & paper pdts	300	34,600	34,900
19	Printing & publishing	2,600	16,800	19,400
20	Primary metal pdts	800	900	1,800
21	Metal fabricated pdts	11,200	12,900	24,100
22	Machinery & equipment	82,700	12,200	94,900
23	Autos, trucks, other tranp. equip	87,400	0	87,400
24	Elec. & communic. pdts	20,500	12,600	33,100
25	Non-metallic mineral pdts	200	49,800	50,000
26	Petroleum & coal pdts	1,700	10,100	11,800
27	Chemical & chemical pdts	200	16,400	16,600
28	Misc manufactured goods	14,600	33,900	48,500
30	Non-residential construction	198,400	0	198,400
31	Repair construction	3,200	200	3,400
32	Transportation & storage	0	29,700	29,700
33	Communication services	100	76,400	76,500
34	Other utilities	618,700	65,400	684,000
38	Other finance, ins., real estate	0	1,600	1,600
39	Business services	113,800	95,600	209,400
40	Personal & other misc services	32,200	17,500	49,700
42	Operating. office, lab. & food	900	500	1,400
43	Travel, advertising, promotion	14,200	36,600	50,800
	Sub-Total (G&S)	1,303,200	590,300	1,893,500
47	Labour income	127,500	2,136,400	2,263,900
	Total	1,430,700	2,726,700	4,157,400

Table I-27: Fundy National Park
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	1,300,000	590,000	1,890,000
Labour Income	127,500	2,140,000	2,270,000
Total	1,430,000	2,730,000	4,160,000

Weighted Multiplers

Type of Impact	Goods and Services Capital	O&M	Labour Income
Employment (1)	5.8	6.1	9.3
Labour Income	0.18	0.19	1.27
GDP	0.46	0.35	1.58

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	7.5	3.6	11.1	5.6	84.2	89.8	100.9
Labour Income	240,000	110,000	350,000	160,000	2,720,000	2,880,000	3,230,000
GDP	600,000	200,000	800,000	200,000	3,380,000	3,580,000	4,380,000

Notes:
1. Person-years per $ 1 million in expenditures
2. Direct employment (in P-Ys); 64.3 in O&M, 4.82 in Capital.

Table I-28: New Brunswick Area NHPS
1989/90 CPS Expenditures by Commodity

S-Level Code	Commodity Description	Capital	O&M	Total
3	Forestry pdts	200	0	200
6	Minerals fuels	0	3,900	3,900
7	Non-metallic minerals	0	0	0
10	Fruit, veg. feed misc fab.	0	0	0
13	Rubber, leather plastic	100	200	300
14	Textile pdts	0	100	100
15	Knitted pdts & clothing	0	2,200	2,300
16	Lumber, sawmill, other w. pdts	6,400	400	6,800
17	Furniture & fixtures	0	2,500	2,500
18	Paper & paper pdts	0	3,700	3,700
19	Printing & publishing	5,200	6,000	11,200
20	Primary metal pdts	300	0	300
21	Metal fabricated pdts	5,200	800	6,000
22	Machinery & equipment	4,400	1,800	6,200
23	Autos, trucks, other tranp. equip	0	300	300
24	Elec. & communic. pdts	5,100	2,100	7,200
25	Non-metallic mineral pdts	0	200	200
26	Petroleum & coal pdts	0	6,100	6,100
27	Chemical & chemical pdts	2,400	800	3,100
28	Misc manufactured goods	1,400	8,200	9,500
29	Residential construction	0	1,100	1,100
30	Non-residential construction	4,200	2,300	6,500
31	Repair construction	1,800	9,400	11,200
32	Transportation & storage	300	400	700
33	Communication services	0	19,600	19,600
34	Other utilities	1,900	18,000	19,900
38	Other finance, ins., real estate	4,000	400	4,400
39	Business services	34,000	97,800	131,800
40	Personal & other misc services	2,700	26,000	28,700
43	Travel, advertising, promotion	9,400	32,600	42,000
	Sub-Total (G&S)	89,000	246,900	335,800
47	Labour income	20,500	479,800	500,300
	Total	109,500	726,700	836,100

Table I-29: New Brunswick Area NHPS
Impacts of CPS Expenditures, 1989/90

1989/90 CPS Expenditures

	Capital	O&M	Total
Goods & Services	90,000	250,000	340,000
Labour Income	20,500	480,000	500,000
Total	110,000	730,000	840,000

Weighted Multiplers

Type of Impact	Goods and Services		Labour Income
	Capital	O&M	
Employment (1)	5.9	8.4	9.3
Labour Income	0.16	0.23	1.27
GDP	0.28	0.39	1.58

Impacts

Type of Impact	From Purchases of Goods & Services			From Labour Income (2)			Grand Total
	Capital	O&M	Sub-Total	Capital	O&M	Sub-Total	
Employment (P-Ys)	0.5	2.1	2.6	0.9	19.2	20.1	22.8
Labour Income	10,000	60,000	70,000	30,000	610,000	640,000	710,000
GDP	20,000	100,000	120,000	30,000	760,000	790,000	910,000

Notes: 1. Person-years per $ 1 million in expenditures

2. Direct employment (in P-Ys); 14.75 in O&M, .75 in Capital

Table I-30
Direct Employment by the Canadian Parks Service, Nova Scotia
1989/90 (P-Ys)

Site	FT (1)	PT (2)	Total	O&M	Capital	Total
Cape Breton Highlands NP	54.0	40.8	94.8	93.1	1.7	94.8
Kejimkujik NP	23.1	14.0	37.1	36.9	0.2	37.1
Alexander G. Bell NHS	6.3	1.9	8.2	8.2	0.0	8.2
Fortress of Louisbourg NHS	70.4	66.1	136.5	128.6	7.8	136.5
South Western District	10.0	11.8	21.8	21.8	0.0	21.8
Halifax Defence Complex	n.a	n.a	40.3	40.3	0.0	40.3
Atlantic Regional Office	132.0	14.0	147.0	139.8	7.2	147.0
Total	163.8	134.5	485.6	468.7	16.9	485.6

1. Full time employees 2. Seasonal and casual employees

Source: Canadian Parks Service

Table I-31
Direct Employment by Canadian Parks Service, PEI
1989/90 (P-Ys)

Site	O&M	Capital	Total
Fort Amherst/Port La Joye	3.17	-	3.17
Province House	2.49	-	2.49
P.E.I National Park	64	0.21	64.21
P.E.I District Office	14.14	-	14.14
Total	83.8	0.21	84.01

Source: Canadian Parks Service

Table I-32
Direct Employment by the Canadian Parks Service, Newfoundland, 1989/90 (P-Ys)

Site	O&M	Capital	Total
Gros Morne National Park	60.7	23.3	83.9
Terra Nova National Park	54.6	3.7	58.3
Nfld Area Historic Sites	34.2	0.8	35.0
Total	149.5	27.7	177.2

Source: Canadian Parks Service

Table I-33
Direct Employment by the Canadian Parks Service, New Brunswick
1989/90 (P-Ys)

Site	O&M	Capital	Total
Carleton Martello	1.90	-	1.90
Beaubears Island	-	-	0.00
Fort Beausejour	7.70	0.75	8.45
St. Andrews Blockhouse	-	-	0.00
Survival of the Acadians	1.15	-	1.15
N.B Area Office	4.00	-	4.00
Fundy National Park	64.30	4.82	69.12
Kouchibouguac National Park	39.15	18.54	57.69
Total	118.20	24.11	142.31

Source: Canadian Parks Service

APPENDIX II

VISITOR EXPENDITURES AND ESTIMATED IMPACTS OF THOSE EXPENDITURES

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VISITOR IMPACT-APPROACH

Rationale

As demonstrated in this study, the CPS facilities in Atlantic Canada play an important role in the tourist product offered in the region. The parks and sites can be directly credited with generating tourist visits to the respective provinces or with getting residents to vacation in their home province. Evidence to support this is found in the various visitor surveys conducted by CPS. At many facilities, visitors report that their visit to the park or site was either the main destination of their trip or was a planned stop. Expenditures made by visitors are an important element of the overall economic impact associated with the existence of the national parks and sites. The general methodology used in this study to estimate visitor impacts is described below.

General Methodology

The general methodology the consultant used for estimating visitor expenditures is as follows:

Step 1 - Determine the number of day use and overnight visitors to each park or historic site received in 1989.

Step 2 - Estimate the average party size, length of stay and origin of visitor for each park and site

Step 3 - On the basis of the length of stay, total visitation and origin of visitors an estimate of "expenditure days" attributable to the individual park or site use is made (see criteria used described later in section).

Step 4 - Data on park or site specific visitor expenditures was collected from various CPS reports. Data on the level of tourist spending at a provincial level was also collected to use as proxy estimates for parks or sites where expenditure data was not available. The site specific data was compiled into a coefficient that estimated visitor expenditures on a per party per day basis.

Step 5 - The total "Expenditure Days" estimated in Step 3 are multiplied by the derived visitor expenditures on a per party per day basis estimated in Step 4 to yield a gross estimate of visitor expenditure for each park and site.

Step 6 - Fees collected from visitors by CPS were deducted from estimates of gross visitor expenditures.

Step 7 - Estimates of Visitor expenditures were adjusted by the CPS to reflect the base year used in this study of 1989.

The information sources used in this analysis and elaboration of various methodological issues follow.

Information Sources

The following heritage site specific CPS data was used to estimate "expenditure days" attributable to each park and site:

- number of visits reported at each park or site;
- the average party size;
- the number of camper party nights recorded at each park;
- the average length of stay for both overnight and day users;

Data on average daily party visitor expenditures was collected from the following sources:

- park visitor surveys;
- exit surveys completed by respective provincial governments;
- A travel tracking study done by Enterprise Cape Breton Corporation (ECBC).

Resident Versus Non-Resident Expenditure

Expenditures made by both residents and non-residents are included in the total estimated impact associated with visitation to the sites. By including resident expenditures the analysis may be overstating the true economic impact as arguably this expenditure is simply a reallocation of economic activity from one sector to another in the provincial economy. However, the parks do play a role in keeping residents within their respective provinces for vacations or other recreational pursuits. The extent this is true is difficult to determine but for the purpose of this analysis the total impact of expenditures made by both residents and non-residents is estimated. The proportion of expenditures accounted for by residents is noted either in the general text or table footnotes for all parks and sites.

Role of Heritage Sites as the Prime Factor in Persuading Tourists to Visit a Certain Province

Non-resident visitor expenditures may be understated if the CPS facility was the main destination or the tourists main reason for visiting a certain province. Arguably, all expenditures made by parties that were primarily motivated to visit a certain province on account of the CPS facility regardless of the relative share the actual visit to the park accounted for as a proportion of time spent in the province. This analysis only takes into account the number of days that are directly associated with the specific site visit.

Allocation of Visitors between Overnight and Day Users

Data on the number of nights camped at the various parks was converted into total camper days (done by adding one day for each party to the number of different camper parties).

To estimate the number of day use visitors. The number of camper parties were deducted from the total number of parties that visited the park.

Criteria for Establishing Total "Expenditure Days" Attributable to Park Visit

CPS provided estimates of the average length of stay by parties at the various parks or sites. The consultant set up the following criteria to estimate per day party expenditures associated with the day use of the various parks or sites.

- Visits of three or more hours in duration a full day of expenditure was assumed. The rationale is that visits of this length constituted a major activity for this group of users. Park use combined with travel time to and from the heritage site accounts for a significant part of the visitors tourist activity that day.

- Visits of more than one hour but less than three are assigned a half days expenditure. A visit of this length demonstrates that the CPS visit was combined with other tourist activities that day. An exception to this rule was made for the Halifax Citadel. Given its location in a major urban centre, visitors likely participated in several different activities on the same day.

- Visits of less than one hour were assigned a quarter days expenditure. A visit of this length constituted a relatively minor share the persons overall tourist activity that day.

Treatment of Fees Collected from Park Visitors

Revenues collected by CPS from park visitors for such things as entrance fees or campground fees were deducted from overall visitor expenditure made on accommodation and travel and entertainment in each province. The rational for this is that the economic impact associated with the operation of the park is captured in the analysis of CPS expenditures. The inclusion of this in the visitor expenditures would result in a double counting of economic impact.

Assigning Expenditures to 602 Commodities

Once total visitor expenditures were estimated for each park/historic site, the next step involved assigning these to expenditure categories to be used for the model run. Once this was completed visitor expenditures were allocated among five expenditure categories. The allocations were consistent with information from various CPS documents on visitor expenditures. The expenditure categories include the following:

- transportation;
- food and beverage;
- accommodation;
- entertainment;
- retail.

To introduce the data to the I/O model, expenditures had first of all to be expressed in terms of the Statistics Canada 602 commodities (Table II-A). The CPS category 'Transportation' for example, was disaggregated into motor gasoline, lubricating oils, bus transport, and repair services. The choice and proportion of 602 commodities was based on the consultant's professional judgement, with the general rule of thumb question asked 'What basket of goods does the average tourist buy?' The final step involved aggregating these 602 expenditures to the small (S) level of aggregation (i.e., 51 commodities).

Once this process was completed for each park/national historic site, visitor expenditures were totalled to arrive at provincial totals. The model was then run and the economic impacts generated at the provincial level. To arrive at total impacts for each individual park/nhs, a series of total impact coefficients were provided to the consultant for each province (see Appendix III). Estimating direct impacts at the individual park/nhs level required using the direct/total impact split provided by the provincial input-output model results.

Table II-A
Estimating Visitor Impacts: Steps

	CPS Categories	Commodity Description	602 #	Proportion of Column 2C	Corresponding S-Level Commodity Group (#)
	[2] *(Net off park revenues and adjust to 1989 $s)*	[3]	[4]	[5]	[6]
Transportation	Transportation	Motor gasoline	395	0.800	26
Food and Beverage		Lubricating oils & grease	397	0.050	26
• Restaurants		Bus Transport (rural/urban)	537	0.050	32
• Alcoholic Bev.		Repair service	551	0.100	40
• Groceries					
Accommodation	Restaurants	Meals	570	1.000	40
Entertainment					
Retail	Alcoholic beverages	Al & Bev. (Distilled)	116	0.600	11
• Handcrafts		Ale beer	119	0.200	11
• Other retail		Wine	120	0.200	11
	Groceries	Eggs in shell	10	0.020	2
		Fruits, fresh, except tropical	13	0.028	2
		Vegetables, fresh	14	0.050	2
		Meat, excluding poultry	52	0.143	9
		Meat, cured	54	0.028	9
		Meat preapred, cooked, not canned	55	0.036	9
		Margarine & shortening	58	0.017	9
		Poultry: fresh, chilled & frozen	65	0.050	9
		Milk: whole, fluid & processed	67	0.073	9
		Butter	69	0.017	9
		Cheese, including processed cheese	70	0.056	9
		Ice cream	72	0.018	9
		Other dairy products	73	0.020	9
		Processed fish & fish products	75	0.021	9
		Fruits berries: processed not canned	76	0.029	10
		Fruits & preparations: canned	77	0.014	10
		Vegetables and preparations: canned	79	0.022	10
		Pickles, relishes and other sauces	82	0.017	10
		Other food preparations	84	0.020	10
		Pet feeds	89	0.018	10
		Breakfast cereal prdts	92	0.015	10
		Biscuit products	93	0.019	10
		Bread & rolls	94	0.043	10
		Other bakery pdts	95	0.035	10
		Chocolate confectionery	98	0.026	10
		Other confectionery	99	0.021	10
		Coffee: roasted, ground & prepared	110	0.031	10
		Potato chips & similar pdts	112	0.017	10
		Foods pdts & byproducts, NES	113	0.042	10
		Carbonated beverages	115	0.057	11
	Accomodation	Accomodation services	569	1.000	40
	Entertainment	Travel & ent.	585	1.000	43
	Handcrafts	Household orn.	521	1.000	28
	Other retail	Tires & tubes: passenger cars	125	0.040	13
		Clothing in woven fabrics	184	0.550	15
		Photographic equip.	503	0.150	28
		Sporting & playgroud equip.	508	0.050	28
		Toys & games sets	509	0.040	28
		Ice	516	0.015	28
		Rental of autos & trucks	577	0.090	40
		Spare parts & maint.	580	0.065	42

New Brunswick

Kouchibouguac National Park

Table II-1
Expenditures by Kouchibouguac National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$1,431,000
Food and Beverage	$1,797,000
Accommodation	$ 723,000
Entertainment	$ 876,000
Retail	$ 411,000
Total	$5,238,000

Note (1) Includes spending by New Brunswick residents.
Note (2) Excludes park revenues of approximately $260,000.

Weighted Impact Multiplier

Type of Impact	Multiplier
Employment (1)	15.3
Labour Income	0.36
GDP	0.60

Note (1): Person-years per $1 million in expenditures.

Kouchibouguac National Park visitor expenditure estimates are based on the following:

- Total number of visits: 152,635;
- Average party size: 3.0;
- Total number of party-visits: 50,878;
- Total expenditure days: 66,124;
- On the basis of the Kouchibouguac Visitor Survey, parties (both non New Brunswick day users and overnight visitors) visiting the park spend approximately $114.40 ($1989) per day. Day users from New Brunswick spend $41.60 per day;
- Approximately 45,621 parties were day use visitors, length of stay on average over three hours resulting in 45,621 expenditure days being attributable to day use visitors;

- Approximately 5,257 parties were overnight visitors, length of stay on average 3.9 days, resulting in 20,503 expenditure days;
- Non-resident expenditure 35 percent versus residents 65 percent.

Table II-2 below shows the estimated impacts of visitor spending for Kouchibouguac National Park.

Table II-2
Economic Impacts of Spending by Kouchibouguac National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	51.48	28.66	80.14
Labour Income	$1,110,000	$776,000	$1,886,000
New Brunswick GDP	$1,837,000	$1,306,000	$3,143,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Fundy National Park

Table II-3
Expenditures by Fundy National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$2,278,474
Food and Beverage	$3,728,412
Accommodation	$1,305,341
Entertainment	$517,835
Retail	$1,449,938
Total	$9,280,000

Note (1): Includes spending by New Brunswick residents.
Note (2): Excludes park revenues of approximately $530,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	13.8
Labour Income	0.32
GDP	0.55

Note (1): Person-years per $1 million in expenditures.

Fundy National Park visitor expenditure estimates are based on the following:

- Total number of visits: 227,555;
- Average party size: 2.9;
- Total number of party-visits: 78,467;
- Total expenditure days: 103,567;
- On the basis of the New Brunswick 1989 Tourist Exit Survey, camper parties visiting the park spend approximately $87 per day. Day use visitors are estimated to spend $99 per day;
- Approximately 66,662 parties were day use visitors, length of stay on average over three hours, resulting in 66,662 expenditure days being attributable to day use visitor parties;
- Approximately 11,905 parties were overnight visitors, length of stay 3.1 days, resulting in 36,906 expenditure days being attributable to overnight visitor parties;
- Non-resident expenditure 65 percent versus residents 35 percent.

Table II-4 shows the economic impacts resulting from these expenditures.

Table II-4
Economic Impacts of Spending by Fundy National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	82.27	45.794	128.064
Labour Income	$1,750,000	$1,220,000	$2,969,000
New Brunswick GDP	$3,000,000	$2,104,000	$5,104,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

New Brunswick Area Historic Parks and Sites

Table II-5
Expenditures by New Brunswick National Historic Site Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$156,000
Food and Beverage	$255,300
Accommodation	$156,000
Entertainment	$35,450
Retail	$99,250
Total	$702,000

Note (1): Includes spending by New Brunswick residents.
Note (2): Excludes park revenues of approximately $4,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	14.4
Labour Income	0.34
GDP	0.57

Note (1): Person-years per $1 million in expenditures.

New Brunswick historic sites visitor expenditure estimates are based on the following:

- Total number of party visits: 28,526;
- Total expenditure days: 7,131 (Note: Visits to New Brunswick's National Historic Sites on average are less than one hour, or 1/4 day factor);
- On the basis of the New Brunswick 1989 Tourist Exit Survey, parties visiting the park spend approximately $99 per day;
- Non-resident expenditure 70 percent versus residents 30 percent.

Table II-6 shows the impacts of those expenditures.

Table II-6
Economic Impacts of Spending by New Brunswick Area NHPS Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	6.5	3.61	10.11
Labour Income	$140,000	$100,000	$240,000
New Brunswick GDP	$240,000	$160,000	$400,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Prince Edward Island

Prince Edward Island National Park

Table II-7
Expenditures by Prince Edward Island National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$3,340,610
Food and Beverage	$10,104,060
Accommodation	$6,192,977
Entertainment	$2,317,869
Other	$3,741,484
Total	$25,697,000

Note (1): Includes spending by Prince Edward Island residents.
Note (2): Excludes park revenues of approximately $732,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	16.2
Labour Income	0.34
GDP	0.54

Note (1): Person-years per $1 million in expenditures.

Prince Edward Island National Park visitor expenditure estimates are based on the following:

- Total number of visits: 692,796 (Note: 1988 data used as a proxy for 1989 and data represents January - September.);
- Average party size: 3.4;
- Total number of party-visits: 203,763;
- Total expenditure days: 235,684 (10,297 camper parties stayed an average of 4.1 days for a total of 42,218 expenditure days and 193,466 day use parties stayed more than 3 hours (full day factor) for 193,466 expenditure days);

- On the basis of the Prince Edward Island 1988 Tourist Exit Indicator Survey, camper parties visiting the park spend approximately $77 ($1989) per day, non-resident day use visitors about $136 ($1989) per day. The consultant estimates the resident day use party spends about $51 ($1989) per day (figure derived by adjusting the non-resident coefficient by the amount spent on accommodation and food and beverage);
- Total camper expenditure days: 42,218;
- Total non-resident day use expenditure days: 156,707;
- Total resident day use expenditure days: 36,758;
- Non-resident expenditure 93 percent versus residents 7 percent.

The impacts of those expenditures are summarized in Table II-8.

Table II-8
Economic Impacts of Spending by Prince Edward Island National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	282.3	134.0	416.3
Labour Income	$5,481,500	$3,255,500	$8,736,000
Prince Edward Island GDP	$8,059,000	$5,817,000	$13,876,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Prince Edward Island National Historic Sites

Table II-9
Expenditures by Prince Edward Island National Historic Site Visitors (1)
by Commodity, 1989

Commodity	Expenditure
Transportation	$209,000
Food and Beverage	$613,000
Accommodation	$490,000
Entertainment	$152,000
Retail	$263,000
Total	$1,727,000

Note (1): Includes spending by Prince Edward Island residents.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	15.5
Labour Income	0.33
GDP	0.52

Note (1): Person-years per $1 million in expenditures.

Prince Edward Island historic sites visitor expenditure estimates are based on the following:

- Total number of party visits: 57,999;
- Total expenditure days: 14,500 (13,666 parties visited Fort Amherst for a total of 3,417 (1/4 day factor) expenditure days; and, 44,333 parties visited Province House, for a total of 11,083 expenditure days (1/4 day factor));
- On the basis of the Prince Edward Island 1988 Tourist Exit Indicator Survey, non-resident day use visitors spend about $136.11 ($1989) per party per day;
- Resident day use visitors are estimated, by the consultant, to spend about $51.21 per party per day (see basis for adjustment under Table II-7);
- Total number of non-resident expenditure days: 10,333;
- Total number of resident expenditure days: 3,583;
- Non-resident expenditure 91 percent versus residents 9 percent.

The impacts resulting from those expenditures are summarized below in Table II-10.

Table II-10
Economic Impacts of Spending by Prince Edward Island Area NHPS Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	18.2	8.6	26.8
Labour Income	$359,000	$211,000	$570,000
Prince Edward Island GDP	$523,000	$375,000	$898,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Newfoundland

Newfoundland National Historic Parks and Sites

Table II-11
Expenditures by Newfoundland National Historic Site Visitors (1)
by Commodity, 1989

Commodity	Expenditure
Transportation	$1,432,000
Food and Beverage	$1,459,000
Accommodation	$1,057,000
Entertainment	$428,000
Retail	$909,000
Total	$5,285,000

Note (1): Includes spending by Newfoundland residents.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	9.7
Labour Income	0.26
GDP	0.44

Note (1): Person-years per $1 million in expenditures.

Newfoundland historic sites visitor expenditure estimates are based on the following:

- Total number of party visits: 196,470;
- Total expenditure days: 50,865 (134,434 parties visited Signal Hill[1], accounting for 17,611 expenditure days; 43,055 parties visited Cape Spear, accounting for 21,528 expenditure days; 6,198 parties visited L'Anse aux Meadows for 6,198 expenditure days; 3,451 parties visited Port Au Choix for 863 expenditure days; and 9,332 parties visited Castle Hill, accounting for 4,665 expenditure days);
- On the basis of the 1988 Newfoundland Exit Survey, daily party expenditures were estimated at approximately $104 ($1989) per day;

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[1] The expenditure day allocation for Signal Hill was reduced below the standard criteria established in the Visitor Impact Methodology. Almost 75 percent of all visits are made by residents of St. John's, making the standard criteria inappropriate.

- Non-resident expenditure 46 percent versus residents 54 percent.

The economic impacts resulting from those expenditures are summarized below in Table II-12.

Table II-12
Economic Impacts of Spending by Newfoundland Area NHPS Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	27.6	23.7	51.3
Labour Income	$687,000	$687,000	$1,374,000
Newfoundland GDP	$1,203,000	$1,122,000	$2,325,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Terra Nova National Park

Table II-13
Expenditures by Terra Nova National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$1,637,073
Food and Beverage	$2,959,635
Accommodation	$325,256
Entertainment	$1,411,270
Retail	$596,766
Total	$6,930,000

Note (1): Includes spending by Newfoundland residents.
Note (2): Excludes park revenues of approximately $500,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	10.6
Labour Income	0.29
GDP	0.48

Note (1): Person-years per $1 million in expenditures.

Terra Nova visitor expenditure estimates are based on the following:

- Total number of visits: 166,571;
- Average party size: 3.0;
- Total number of party-visits: 55,523 (47,419 day use parties and 8,104 overnight parties);
- Total expenditure days, overnight visitors: 33,227;
- A total of 47,419 day use parties stayed over 3 hours for 47,419 expenditure days;
- Total expenditure days: 80,646;
- On the basis of the 1990 Terra Nova Visitor Survey, visitor parties to the park spend approximately $92 ($1989) per day;
- Non-resident expenditure 25 percent versus residents 75 percent.

Table II-14 summarizes the economic impacts of those expenditures.

Table II-14
Economic Impacts of Spending by Terra Nova National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	39.5	34.1	73.6
Labour Income	$990,000	$1,000,000	$1,990,000
Newfoundland GDP	$1,720,000	$1,610,000	$3,330,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Gros Morne National Park

Table II-15
Expenditures by Gros Morne National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$692,000
Food and Beverage	$1,073,000
Accommodation	$334,000
Entertainment	$641,000
Retail	$908,000
Total	$3,648,000

Note (1): Includes spending by Newfoundland residents.
Note (2): Excludes park revenues of approximately $150,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	9.0
Labour Income	0.24
GDP	0.41

Note (1): Person-years per $1 million in expenditures.

Gros Morne visitor estimates are based on the following:

- Total number of visits: 100,000;
- Average party size: 3.0;
- Total number of party-visits: 33,000;
- Total expenditure days: 50,228 (25,228 camper expenditure days, and 25,000 day use party visitor expenditure days);
- On the basis of the Gros Morne 1987 Visitor Survey, camper parties visiting the park spend approximately $69.0 ($1989) per day and day use visitors about $82.7 ($1989) per day;
- Non-resident expenditure 57 percent versus residents 43 percent.

The estimates of economic impacts resulting from those expenditures are summarized below.

Table II-16
Economic Impacts of Spending by Gros Morne National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	17.4	15.0	32.4
Labour Income	$433,000	$442,000	$875,000
Newfoundland GDP	$775,000	$721,000	$1,496,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Nova Scotia

Mainland Nova Scotia National Historic Parks and Sites

Table II-17
Expenditures by Mainland Nova Scotia National Historic Site Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$1,257,745
Food and Beverage	$2,879,879
Accommodation	$2,724,720
Entertainment	$240,968
Retail	$1,116,688
Total	$8,220,000

Note (1): Includes spending by Nova Scotia residents.
Note (2): Excludes park revenues of approximately $124,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	18.3
Labour Income	0.43
GDP	0.64

Note (1): Person-years per $1 million in expenditures.

Mainland Nova Scotia historic sites visitor expenditure estimates are based on the following:

- Total number of party-visits: 238,657
- Total expenditure days: 59,664 (visitors to historic sites in southwest Nova Scotia stay (69,625) an average of less than one hour for 17,406 expenditure days; Visitors to the Halifax Defence Complex (169,032) stay less than one hour for 42,258 expenditure days);
- On the basis of the 1989 Nova Scotia Exit Survey, visitor parties spend about $139.86 ($1989) each per day;
- Non-resident expenditure 68 percent versus residents 32 percent.

The estimates of economic impacts resulting from these expenditures are summarized below.

Table II-18
Economic Impacts of Spending by Nova Scotia Area NHPS Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	94.41	56.39	150.8
Labour Income	$2,050,000	$1,510,000	$3,560,000
Nova Scotia GDP	$2,950,000	$2,320,000	$5,270,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Cape Breton Island National Historic Parks and Sites

Table II-19
Expenditures by Cape Breton Island National Historic Site Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$1,317,098
Food and Beverage	$2,208,874
Accommodation	$2,152,229
Entertainment	$794,088
Retail	$1,527,711
Total	$8,000,000

Note (1): Includes spending by Nova Scotia residents.
Note (2): Excludes park revenues of approximately $470,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	17.0
Labour Income	0.40
GDP	0.60

Note (1): Person-years per $1 million in expenditures.

Cape Breton historic sites visitor expenditure estimates are based on the following:

- Total party visits, 1989 - 147,727;
- Total expenditure days - 106,062 (67,431 parties visited A.G. Bell and stayed an average of 1/2 day for 33,716 expenditure days; 71,396 parties visited Louisbourg and stayed more than 3 hours for 71,396 expenditure days; and, 1,900 parties visited Marconi and stayed an average between 1 and 3 hours for 950 expenditure days);
- On the basis of a Travel Tracking Study, 1989, prepared for Enterprise Cape Breton Corporation, day use visitors spend $89 per day. The consultant adjusted this factor to $36 per day for Local Day Use visitors to the Fortress of Louisbourg. Many of these visitors are using the beach at Kennington Cove and are from the local area;
- Non-resident expenditure 85 percent versus residents 15 percent.

The estimated impacts of these expenditures are summarized below.

Table II-20
Economic Impacts of Spending by Cape Breton Island NHPS Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	83.8	52.2	136.0
Labour Income	$1,842,000	$1,358,000	$3,200,000
Nova Scotia GDP	$2,686,000	$2,114,000	$4,800,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Cape Breton Highlands National Park

Table II-21
Expenditures by Cape Breton National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$2,798,655
Food and Beverages	$5,826,077
Accommodation	$4,299,293
Entertainment	$1,684,752
Retail	$3,241,223
Total	$17,850,000

Note (1): Includes spending by Nova Scotia residents.
Note (2): Excludes park revenues of approximately $655,000.

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment(1)	17.0
Labour Income	0.40
GDP	0.60

Note (1): Person-years per $1 million in expenditures.

Cape Breton Highlands visitor expenditure estimates are based on the following:

- Total number of visits: 571,041;
- Average party size: 3.0;
- Total number of party-visits: 190,347;
- Total expenditure days: 212,252 (13,297 camper parties stayed on average 2.7 days for 35,902 camper expenditure days; and 176,550 day use parties stayed for more than 3 hours for 176,550 day use party visitor expenditure days);
- On the basis of a Travel Tracking Study, prepared for Enterprise Cape Breton Corporation, camper parties visiting the park spend approximately $73.38 per day and day use visitors about $89.33 per day;
- Non-resident expenditure 84 percent versus residents of Nova Scotia 16 percent.

The estimates of economic impacts resulting from these expenditures are summarized in Table II-22, below.

Table II-22
Economic Impacts of Spending by Cape Breton National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	190.0	113.4	303.4
Labour Income	$4,160,000	$3,050,000	$7,210,000
Nova Scotia GDP	$5,960,000	$4,680,000	$10,640,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

Kejimkujik National Park

Table II-23
Expenditures by Kejimkujik National Park Visitors (1)
by Commodity (2), 1989

Commodity	Expenditure
Transportation	$265,824
Food and Beverage	$597,082
Accommodation	$2,672
Entertainment	$98,150
Retail	$286,276
Total	$1,250,000 (3)

Note (1): Includes spending by Nova Scotia residents.
Note (2): Excludes park revenues of approximately $295,000.
Note (3): This estimate understates visitor expenditures due to the treatment of backcountry campers. The methodology used treated these campers as day use visitors. In fact, on average, these backcountry visitors have an average length of stay of 2.42 days and an average party size of 2.9 persons. There are 9,000 person-nights of accommodation registered in the park, this translates into 3,103 party nights of backcountry campers. The underestimate of expenditures is in the order of about $120,000 (less than 10 percent).

Weighted Impact Multipliers

Type of Impact	Multiplier
Employment (1)	14.8
Labour Income	0.36
GDP	0.59

Note (1): Person-years per $1 million in expenditures.

Kejimkujik National Park visitor expenditure estimates are based on the following:

- Total number of visits: 51,766;
- Average party size: 3.0;
- Total number of party-visits: 17,266 (11,896 day use party visits and 5,370 overnight party visits);
- Total expenditure days: 40,896 (11,896 day use parties stayed more than 3 hours for 11,896 expenditure days; and, 5,370 overnight parties stayed on average 5.4 days for 29,000 expenditure days);
- On the basis of 1989 Kejimkujik Economic Impact Survey visitor parties spend approximately $37.80 per day;
- Non-resident expenditures 30 percent versus residents 70 percent.

Table II-24, below summarizes the estimated economic impacts of those expenditures.

Table II-24
Economic Impacts of Spending by Kejimkujik National Park Visitors, 1989

Type of Impact	Direct	Spin-off	Total
Employment (person-years)	11.6	6.9	18.5
Labour Income	$250,000	$190,000	$440,000
Nova Scotia GDP	$412,700	$330,300	$743,000

Note: Direct impacts were estimated using the percentage breakdown of direct and total impacts listed in the input-output results for the provincial visitor expenditure model run. Spin-off impacts were derived as the difference between total and direct impacts.

APPENDIX III

TOTAL IMPACT COEFFICIENTS BY PROVINCE

APPENDIX III
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Table III-1: Total Impact Coefficients (1) For Various Commodities, Newfoundland
(of $1 million spent in each commodity)

S-Level Code	Commodity Description	Gross Production ($'000,000s)	Labour Income ($'000,000s)	Employment (P-Ys)	GDP ($'000,000s)
1	Grains	1.18	0.35	12.1	0.50
2	Other agric pdts	1.12	0.34	12.4	0.49
3	Forestry pdts	2.37	0.70	24.2	1.08
4	Fishing & Trapping pdts	2.01	0.74	24.6	1.01
5	Metallic ores & concent.	1.76	0.35	8.2	0.70
6	Minerals fuels	0.02	0.10	0.1	0.01
7	Non-metallic minerals	0.43	0.09	2.1	0.16
8	Service inc. to mining	1.53	0.32	7.4	0.64
9	Meat, fish & dairy pdts	0.65	0.17	6.5	0.28
10	Fruit, veg. feed misc fab.	0.29	0.09	3.1	0.13
11	Beverages	0.96	0.28	10.3	0.74
12	Tobacco & tobacco pdts	0.00	0.00	0.0	0.00
13	Rubber, leather plastic	0.03	0.01	0.2	0.01
14	Textile pdts	0.01	0.00	0.0	0.01
15	Knitted pdts & clothing	0.01	0.00	0.0	0.00
16	Lumber, sawmill, other w. pdts	1.12	0.31	11.1	0.50
17	Furniture & fixtures	0.08	0.02	0.8	0.04
18	Paper & paper pdts	0.11	0.02	0.9	0.05
19	Printing & publishing	0.38	0.10	3.5	0.17
20	Primary metal pdts	0.0[illegible]	0.00	0.0	0.00
21	Metal fabricated pdts	0.07	0.02	0.6	0.03
22	Machinery & equipment	0.04	0.01	0.3	0.02
23	Autos, trucks, other tranp. equip	0.03	0.01	0.2	0.02
24	Elec. & communic. pdts	0.02	0.00	0.0	0.01
25	Non-metallic mineral pdts	0.33	0.09	3.1	0.15
26	Petroleum & coal pdts	0.01	0.00	0.0	0.01
27	Chemical & chemical pdts	0.00	0.00	0.0	0.00
28	Misc manufactured goods	0.01	0.00	0.1	0.01
29	Residential construction	1.97	0.44	13.6	0.72
30	Non-residential construction	1.97	0.44	13.6	0.72
31	Repair construction	1.96	0.43	13.4	0.72
32	Transportation & storage	0.70	0.19	5.9	0.32
33	Communication services	2.27	0.79	22.7	1.17
34	Other utilities	1.37	0.24	5.5	0.96
35	Wholesale margins	0.71	0.27	10.1	0.40
36	Retail margins	2.21	0.75	39.3	1.20
37	Imputed rent owner ocpd dwelling	1.58	0.38	2.8	1.15
38	Other finance, ins., real estate	1.12	0.28	9.1	0.74
39	Business services	0.49	0.17	5.4	0.26
40	Personal & other misc services	1.58	0.53	19.8	0.87
41	Transportation margins	0.33	0.59	24.3	1.16
42	Operating, office, lab. & food	1.41	0.14	5.1	0.20
43	Travel, advertising, promotion	1.81	0.27	9.6	0.44
44	Non-competing inports	0.00	0.00	0.0	0.00
45	Unallocated imports & exports	0.00	0.00	0.0	-2.40
46	Net direct taxes	0.00	0.00	0.0	0.88
47	Labour income	1.77	1.35	8.7	1.67
48	Net income uninc. business	1.77	1.35	8.7	1.67
49	Other operating surplus	0.00	0.00	0.0	1.00
50	Royalties on Natural resources	1.00	0.00	0.0	1.00
51	Supplimentary labour income	1.77	1.98	8.7	1.67

Notes: 1. These coefficients were derived so as to reflect the distribution of CPS expenditures & visitor expenditures at the L-Level. They should not to be regarded as general purpose coefficients.

Table III-2: Total Impact Coefficients (1) For Various Commodities, PEI
(of $1 million spent in each commodity)

S-Level Code	Commodity Description	Gross Production ($'000,000s)	Labour Income ($'000,000s)	Employment (P-Ys)	GDP ($'000,000s)
1	Grains	0.86	1.04	8.70	0.35
2	Other agric pdts	1.33	0.37	14.70	0.57
3	Forestry pdts	2.00	0.67	25.50	0.92
4	Fishing & Trapping pdts	1.77	0.56	17.80	0.85
5	Metallic ores & concent.	11.00	0.00	0.10	0.01
6	Minerals fuels	0.03	0.00	0.10	0.02
7	Non-metallic minerals	0.10	0.02	0.60	0.05
8	Service inc. to mining	0.31	0.07	1.80	0.18
9	Meat, fish & dairy pdts	0.87	0.20	8.90	0.32
10	Fruit, veg. feed misc fab.	0.21	0.05	2.20	0.08
11	Beverages	0.21	0.04	2.20	0.15
12	Tobacco & tobacco pdts	0.00	0.00	0.00	0.00
13	Rubber, leather plastic	0.01	0.00	0.00	0.00
14	Textile pdts	0.05	0.01	0.50	0.02
15	Knitted pdts & clothing	0.01	0.00	0.10	0.00
16	Lumber, sawmill, other w. pdts	0.24	0.05	2.10	0.09
17	Furniture & fixtures	0.00	0.00	0.00	0.00
18	Paper & paper pdts	0.01	0.00	0.00	0.01
19	Printing & publishing	0.43	0.09	3.90	0.16
20	Primary metal pdts	0.00	0.00	0.00	0.00
21	Metal fabricated pdts	0.04	0.01	0.20	0.01
22	Machinery & equipment	0.10	0.02	0.90	0.04
23	Autos, trucks, other tranp. equip	0.01	0.00	0.00	0.00
24	Elec. & communic. pdts	0.02	0.00	0.00	0.01
25	Non-metallic mineral pdts	0.25	0.05	2.20	0.10
26	Petroleum & coal pdts	0.01	0.00	0.00	0.01
27	Chemical & chemical pdts	0.00	0.00	0.00	0.00
28	Misc manufactured goods	0.01	0.00	0.10	0.00
29	Residential construction	1.74	0.45	17.40	0.72
30	Non-residential construction	1.74	0.45	17.40	0.72
31	Repair construction	1.74	0.45	17.40	0.72
32	Transportation & storage	0.29	0.06	1.90	0.11
33	Communication services	1.63	0.53	15.70	0.87
34	Other utilities	0.77	0.14	3.40	0.59
35	Wholesale margins	0.36	0.11	4.80	0.17
36	Retail margins	2.16	0.70	41.30	1.11
37	Imputed rent owner ocpd dwelling	1.56	1.00	3.60	1.12
38	Other finance, ins., real estate	1.42	0.32	12.70	0.78
39	Business services	0.44	0.15	6.60	0.22
40	Personal & other misc services	1.67	0.54	25.70	0.85
41	Transportation margins	0.00	0.20	1.50	0.06
42	Operating, office, lab. & food	1.43	0.12	5.00	0.17
43	Travel, advertising, promotion	1.82	0.24	9.80	0.37
44	Non-competing inports	0.00	0.00	0.00	0.00
45	Unallocated imports & exports	0.00	0.00	0.00	-2.40
46	Net direct taxes	0.00	0.00	0.00	0.88
47	Labour income	1.72	1.26	9.80	1.56
48	Net income uninc. business	1.72	1.26	9.80	1.56
49	Other operating surplus	0.00	0.00	0.00	1.00
50	Royalties on Natural resources	1.00	0.00	0.00	1.00
51	Supplimentary labour income	1.72	1.26	9.80	1.56

Notes: 1. These coefficients were derived so as to reflect the distribution of CPS expenditures & visitor expenditures at the L-Level. They should not to be regarded as general purpose coefficients.

Table III-3: Total Impact Coefficients (1) For Various Commodities, Nova Scotia
(of $1million spent in each commodity)

S-Level Code	Commodity Description	Gross Production ($'000,000s)	Labour Income ($'000,000s)	Employment (P-Y)	GDP ($'000,000s)
1	Grains	0.66	0.17	5.90	0.25
2	Other agric pdts	1.48	0.37	14.40	0.58
3	Forestry pdts	1.91	0.38	13.70	0.71
4	Fishing & Trapping pdts	2.15	0.72	27.90	1.00
5	Metallic ores & concent.	0.14	0.02	0.80	0.05
6	Minerals fuels	0.01	0.00	0.00	0.01
7	Non-metallic minerals	0.02	0.00	0.10	0.01
8	Service inc. to mining	1.86	0.45	13.60	0.83
9	Meat, fish & dairy pdts	0.98	0.22	8.70	0.36
10	Fruit, veg. feed misc fab.	0.35	0.08	3.30	0.13
11	Beverages	0.82	0.20	7.90	0.62
12	Tobacco & tobacco pdts	0.01	0.00	0.00	0.00
13	Rubber, leather plastic	0.21	0.05	1.80	0.09
14	Textile pdts	0.10	0.02	0.80	0.04
15	Knitted pdts & clothing	0.06	0.01	0.50	0.03
16	Lumber, sawmill, other w. pdts	1.12	0.23	8.50	0.41
17	Furniture & fixtures	0.17	0.04	14.00	0.07
18	Paper & paper pdts	0.25	0.05	1.70	0.09
19	Printing & publishing	0.40	0.08	2.80	0.15
20	Primary metal pdts	0.02	0.00	0.00	0.01
21	Metal fabricated pdts	0.15	0.03	1.10	0.06
22	Machinery & equipment	0.51	0.12	4.20	0.21
23	Autos, trucks, other tranp. equip	0.04	0.01	0.20	0.02
24	Elec. & communic. pdts	0.09	0.02	0.80	0.04
25	Non-metallic mineral pdts	0.87	0.18	6.40	0.34
26	Petroleum & coal pdts	1.13	0.24	8.60	0.50
27	Chemical & chemical pdts	0.00	0.00	0.00	0.00
28	Misc manufactured goods	0.02	0.00	0.10	0.01
29	Residential construction	2.16	0.51	17.00	0.82
30	Non-residential construction	2.16	0.51	17.00	0.82
31	Repair construction	2.16	0.51	17.00	0.82
32	Transportation & storage	0.74	0.19	5.70	0.31
33	Communication services	2.24	0.72	21.50	1.14
34	Other utilities	1.56	0.28	7.10	0.74
35	Wholesale margins	0.70	0.23	8.30	0.32
36	Retail margins	2.25	0.72	39.50	1.16
37	Imputed rent owner ocpd dwelling	1.63	0.38	3.50	1.14
38	Other finance, ins., real estate	1.46	0.34	12.00	0.82
39	Business services	0.64	0.21	8.80	0.31
40	Personal & other misc services	1.95	0.63	27.20	0.98
41	Transportation margins	0.28	0.44	18.80	0.90
42	Operating. office, lab. & food	1.54	0.13	5.20	0.21
43	Travel, advertising, promotion	2.13	0.32	12.30	0.51
44	Non-competing inports	0.00	0.00	0.00	0.00
45	Unallocated imports & exports	0.00	0.00	0.00	-2.40
46	Net direct taxes	0.00	0.00	0.00	0.00
47	Labour income	1.92	1.31	10.40	1.64
48	Net income uninc. business	1.92	1.31	10.40	1.64
49	Other operating surplus	0.00	0.00	0.00	1.00
50	Royalties on Natural resources	1.00	0.00	0.00	1.00
51	Supplimentary labour income	1.92	1.31	10.40	1.64

Notes: 1. These coefficients were derived so as to reflect the distribution of CPS expenditures & visitor expenditures at the L-Level. They should not to be regarded as general purpose coefficients.

Table III-4: Total Impact Coefficients (1) For Various Commodities, New Brunswick
(of $1 million spent in each commodity)

S-Level Code	Commodity Description	Gross Production ($'000,000s)	Labour Income ($'000,000s)	Employment (P-Y)	GDP ($'000,000s)
1	Grains	0.70	0.18	6.70	0.28
2	Other agric pdts	1.22	0.33	12.50	0.51
3	Forestry pdts	1.91	0.49	18.00	0.88
4	Fishing & Trapping pdts	1.31	0.45	15.90	0.62
5	Metallic ores & concent.	1.51	0.33	9.80	0.68
6	Minerals fuels	0.12	0.02	0.70	0.06
7	Non-metallic minerals	0.81	0.16	4.90	0.34
8	Service inc. to mining	0.29	0.06	1.90	0.14
9	Meat, fish & dairy pdts	0.97	0.20	8.40	0.34
10	Fruit, veg. feed misc fab.	0.39	0.09	3.50	0.14
11	Beverages	0.78	0.17	7.30	0.58
12	Tobacco & tobacco pdts	0.01	0.00	0.00	0.00
13	Rubber, leather plastic	0.20	0.05	1.80	0.08
14	Textile pdts	0.05	0.01	0.30	0.02
15	Knitted pdts & clothing	0.02	0.00	0.10	0.10
16	Lumber, sawmill, other w. pdts	1.37	0.28	10.20	0.49
17	Furniture & fixtures	0.17	0.03	1.50	0.07
18	Paper & paper pdts	0.44	0.09	3.00	0.14
19	Printing & publishing	0.43	0.09	2.90	0.15
20	Primary metal pdts	0.02	0.00	0.00	0.01
21	Metal fabricated pdts	0.12	0.02	0.90	0.05
22	Machinery & equipment	0.14	0.03	1.10	0.06
23	Autos, trucks, other tranp. equip	0.02	0.00	0.10	0.01
24	Elec. & communic. pdts	0.02	0.00	0.00	0.01
25	Non-metallic mineral pdts	0.34	0.08	2.50	0.13
26	Petroleum & coal pdts	0.72	0.15	5.20	0.30
27	Chemical & chemical pdts	0.00	0.00	0.00	0.00
28	Misc manufactured goods	0.01	0.00	0.10	0.01
29	Residential construction	1.87	0.48	16.40	0.77
30	Non-residential construction	1.87	0.48	16.40	0.77
31	Repair construction	1.87	0.48	16.40	0.77
32	Transportation & storage	0.71	0.18	5.70	0.31
33	Communication services	2.05	0.66	20.00	1.08
34	Other utilities	0.90	0.13	2.90	0.55
35	Wholesale margins	0.57	0.21	8.10	0.29
36	Retail margins	2.07	0.66	39.10	1.11
37	Imputed rent owner ocpd dwelling	1.57	0.36	3.30	1.13
38	Other finance, ins., real estate	1.11	0.25	9.60	0.66
39	Business services	0.30	0.10	3.80	0.15
40	Personal & other misc services	1.67	0.54	24.00	0.87
41	Transportation margins	0.22	0.50	23.00	1.04
42	Operating, office, lab. & food	1.44	0.11	4.70	0.18
43	Travel, advertising, promotion	1.89	0.27	10.20	0.43
44	Non-competing inports	0.00	0.00	0.00	0.00
45	Unallocated imports & exports	0.00	0.00	0.00	-2.40
46	Net direct taxes	0.00	0.00	0.00	0.00
47	Labour income	1.75	1.27	9.30	1.58
48	Net income uninc. business	1.75	1.27	9.30	1.58
49	Other operating surplus	0.00	0.00	0.00	1.00
50	Royalties on Natural resources	1.00	0.00	0.00	1.00
51	Supplimentary labour income	1.75	1.27	9.30	1.58

Notes: 1. These coefficients were derived so as to reflect the distribution of CPS expenditures & visitor expenditures at the L-Level. They should not to be regarded as general purpose coefficients.

Table III-5: Consumer Price Indices for Various Commodity Groups by Selected Atlantic Canada Cities

Annual Average Consumer Price Index - St. John's, Nfld. 1985-1989

	All Items	Food	Housing	Clothing	Transport	Health & Pers.	Recreation	Tobacco
1985	97.1	95.4	99.5	98.1	96.5	96.2	96.2	91.8
1986	100.0	99.9	99.9	99.9	99.9	100.0	99.9	100.0
1987	102.9	104.2	101.7	103.8	101.2	105.0	105.4	103.5
1988	105.3	105.0	104.6	107.4	101.4	108.4	110.6	107.7
1989	109.1	108.3	106.7	111.9	106.4	112.2	115.8	115.4

Annual Average Consumer Price Index - Saint John, N.B. 1985-1989

	All Items	Food	Housing	Clothing	Transport	Health & Pers.	Recreation	Tobacco
1985	96.7	94.7	98.8	97.3	97.9	97.6	94.9	89.4
1986	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1987	103.2	105.6	102.6	103.6	99.5	104.9	105.1	105.0
1988	106.6	106.8	105.3	108.3	102.1	109.1	111.1	115.9
1989	111.7	112.1	108.7	111.8	107.4	113.8	115.1	133.3

Annual Average Consumer Price Index - Charlottetown/Summerside, P.E.I. 1985-1989

	All Items	Food	Housing	Clothing	Transport	Health & Pers.	Recreation	Tobacco
1985	98.0	96.6	101.3	96.9	98.9	96.0	94.9	88.9
1986	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1987	103.6	105.0	101.9	102.6	102.3	104.9	105.7	108.2
1988	107.4	108.0	105.5	106.5	103.4	110.3	111.6	117.4
1989	111.5	112.1	108.1	110.1	106.6	115.0	116.6	130.7

Annual Average Consumer Price Index - Halifax, N.S. 1985-1989

	All Items	Food	Housing	Clothing	Transport	Health & Pers.	Recreation	Tobacco
1985	96.7	96.3	98.4	98.7	97.4	97.0	95.3	87.7
1986	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1987	103.6	104.3	102.0	103.6	101.9	105.1	105.5	109.6
1988	107.4	110.0	104.8	107.9	103.9	109.8	110.9	114.9
1989	112.5	116.8	108.8	111.1	107.9	115.1	115.5	128.8

Source: Statistics Canada.